



## ADMINISTRATIVE REPORT

Report Date: June 1, 2015  
Contact: Jane Pickering  
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Meeting Date: June 9, 2015

TO: Vancouver City Council  
FROM: General Manager of Planning and Development Services  
SUBJECT: Heritage Action Plan Update

### **RECOMMENDATION**

- A. THAT Council receive this report as an update of the Heritage Action Plan activities completed to date and the activities to be completed in 2015.
- B. THAT Council approve a grant of up to \$73,250 to the Vancouver Heritage Foundation to undertake a pilot program to provide grants to owners of character homes to complete energy efficiency upgrades (the source of funding is the 2015 Sustainability and Planning and Development Services operating budgets).

Recommendation B authorizes a grant and requires eight affirmative votes for approval.

### **REPORT SUMMARY**

This report provides an update on the work that has been completed in the first phase of the Heritage Action Plan and outlines the upcoming work and activities. To date, the focus of the work has been on:

- completing the First Shaughnessy heritage and zoning review which is subject of a companion report (RTS 10942),
- launching the Heritage Register Upgrade,
- reviewing the Heritage Conservation Program,
- developing public awareness initiatives in collaboration with partner organizations,
- initiating the character house zoning review, and
- consulting the public related to all of the above.

The report also recommends the approval of a grant to the Vancouver Heritage Foundation for a pilot program to provide grants to encourage owners of character and heritage houses to complete energy efficiency upgrades.

The work is scheduled to be concluded by the end of 2015 with a report to Council to follow.

### ***COUNCIL AUTHORITY/PREVIOUS DECISIONS***

- Heritage Action Plan (December 2013) - comprehensive review of Heritage Conservation Program.
- Heritage Action Plan: Steps to enhance protection of First Shaughnessy and pre-1940 character houses (June 2014):
  - One year temporary protection period in First Shaughnessy.
  - Character assessment procedure for pre-1940 houses.
  - Pro forma exemption procedure.
- Heritage Action Plan: Encouraging reuse and recycling of construction waste from pre-1940 houses and construction and demolition waste diversion strategy (June 2014).

### ***CITY MANAGER'S/GENERAL MANAGER'S COMMENTS***

The General Manager of Planning and Development Services RECOMMENDS approval of A and B.

### ***REPORT***

#### ***Background***

The City's Heritage Conservation Program and the Heritage Register (then known as the Heritage Inventory) were adopted by Council in 1986 in the City's centennial year. At that time best practices in heritage conservation employed a materials based approach to identify resources which relied principally on architectural styles from various periods of the city's development. The approach to identifying heritage resources changed significantly in the early 2000s through a national effort known as the Historic Places Initiative (HPI) which also created a National Heritage Register. This work recognized international best practices by adopting a community values based approach encompassing historical, cultural, aesthetic, scientific, and educational values. In addition, the initiative noted that many community values have intangible qualities and significance, such as community traditions or spiritual values, and it asserted that those also need to be identified and evaluated. These values manifest themselves into themes which help to describe a society's collective cultural history and assist in identifying key heritage features. This approach as outlined in the national HPI initiative is being utilized in the review of the Heritage Program and Upgrading of the Heritage Register which is now underway.

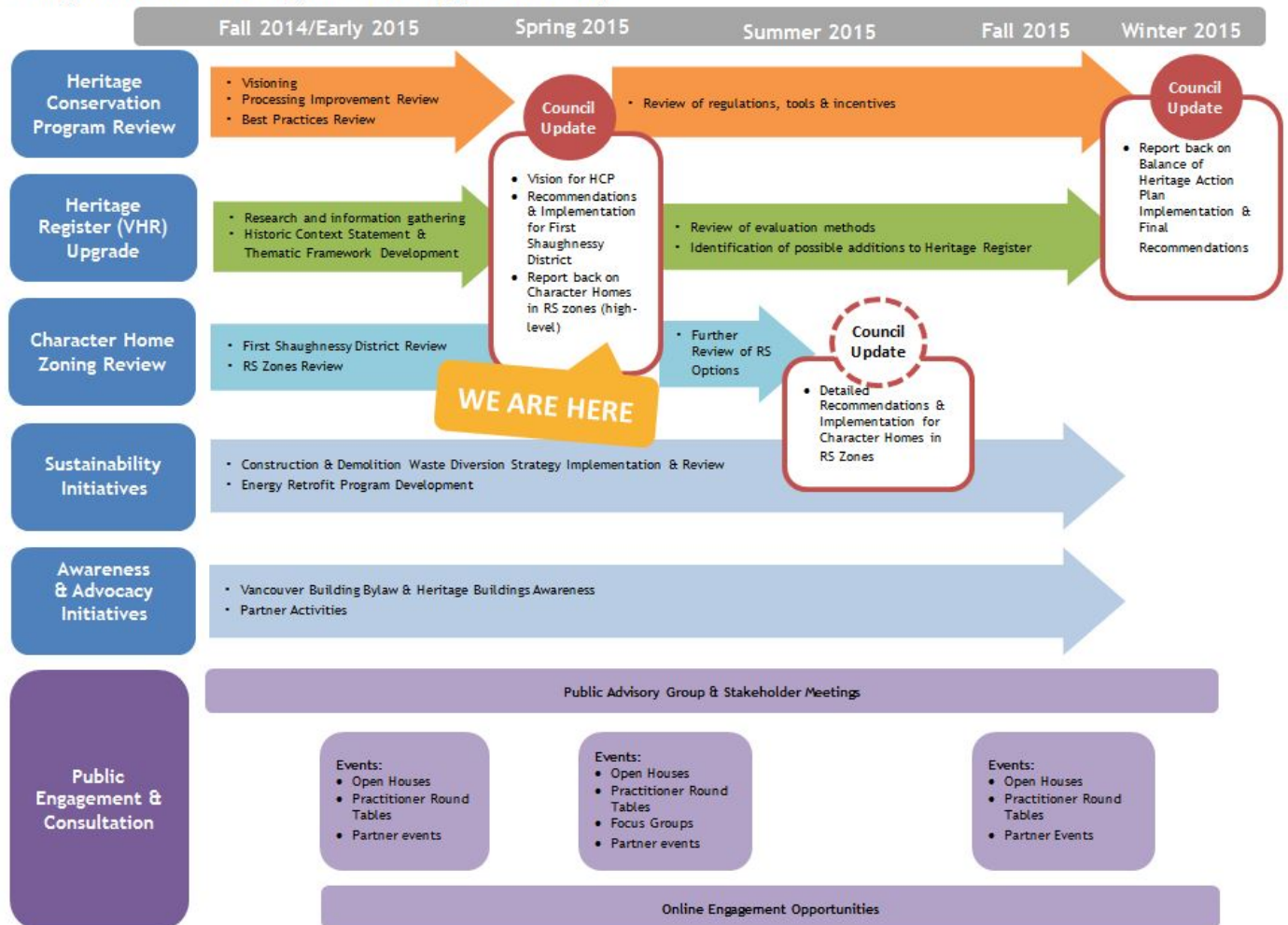
## Strategic Analysis

### Heritage Action Plan Overview

The Heritage Action Plan is being led by the Heritage Group of Planning and Development Services together with a consultant team, led by Donald Luxton & Associates with main subconsultants City Spaces, Coriolis Consulting (economic analysis), and Young Anderson Barristers and Solicitors, as well as other subconsultants.

The key work items, timing for their completion and public consultation events are illustrated in the following diagram:

Heritage Action Plan - Work Program & Public Engagement Summary



## 1. Heritage Conservation Program Review

The consultant team has undertaken a review of Vancouver's Heritage Conservation Program as well as global best practices.

Some of the key achievements/successes of the current Heritage Conservation Program include:

- 2200 sites and over 100 landscapes and monuments identified on the Heritage Register with almost 25% of them protected.
- The Vancouver Heritage Register is updated annually with 68 resources added in the past five years, most on a voluntary basis by owners who are seeking incentives and agree to protect the resource.
- Incentives program for DTES which generated over \$550 million of work on 41 buildings in the last decade.
- A range of incentives and tools that provide flexibility to owners who retain and conserve heritage resources.
- Heritage awareness supported through the heritage plaque program, the biannual Heritage Awards and annual operating funding provided to the Vancouver Heritage Foundation whose activities include tours, lectures, and education.

### Global Best Practices

The consultant reviewed a number of selected municipal heritage programs to determine global best practices including Edmonton, Victoria, Montreal, San Francisco, Chicago, Melbourne, Perth and Sydney (see Appendix A). The key program components from the consultant review are summarized as follows:

	Vancouver	Victoria	Edmonton	Montreal	San Francisco	Chicago	Melbourne	Perth	Sydney
Population	603,502	80,017	877,926	1,680,000	837,442	2,718,782	116,431	21,860	187,561
Heritage Register/ Database/ Inventory	√	√	√	√	√	√	√	√	√
Number of sites on Register	2,172	1,100	763		3,530	17,000	8,000	260	2,360
Heritage Conservation Area/ District		√		√	√	√	√	√	√
Heritage Zoning Districts, Plans, Policies and Guidelines	√	√	√	√	√	√	√	√	√
Historic Context Statement/ Thematic Framework	√	√	√				√		
Legal Designations / Landmark Status	√	√	√	√	√	√			
Transfer of Density/ Floor Area Bonuses	√					√		√	√
Permit Fee Waivers/ Permit Exemptions						√		√	√
Tax Incentives/ Property Tax Exemptions		√	√		√	√		√	
Grants/ Loan Subsidies		√	√	√	√	√	√	√	
Education/ Awareness	√	√	√	√	√	√	√	√	√

The review identified that Vancouver employs many of the tools utilized in other jurisdictions however there is a need to update some components such as the Heritage Register to align with best practices. Other program components such as financial incentives (i.e. grants and tax exemptions) are currently available in the Downtown Eastside until the end of 2015.

Further examination of the costs and benefits of continuing this program and/or its applicability elsewhere are to be explored by the consultant and reviewed by staff.

### Draft Strategic Plan

The outline for a proposed Strategic Plan has been drafted which includes a Vision, Goals and Strategic Directions to guide the Heritage Conservation Program into the future. The draft Strategic Plan includes the following:

#### *Vision*

The City of Vancouver's Heritage Conservation Program encourages and fosters the retention and conservation of historic places across the city, while supporting the ongoing sustainable development of its neighbourhoods.

#### *Goal 1 - Recognize A Diversity of Heritage Values*

Identify, celebrate and protect a broad range of historic places, including those with intangible social and cultural values, which illustrate Vancouver's history and diverse development over time. Encourage the conservation of neighbourhood character by preserving historic places that support local identity.

#### Strategic Directions

- Implement a sustainable process and methodology to ensure ongoing updating of the Heritage Register
- Integrate heritage conservation into Neighbourhood Planning
- Enhancing City Stewardship

#### Program Components

- Procedure to update Vancouver Heritage Register
- Policy to incorporate Historic Context Statements and Thematic Frameworks into neighbourhood plans to identify heritage resources
- Statements of Significance for resources on the Heritage Register

#### *Goal 2 - Enhance Management Tools to achieve Heritage and other City Objectives*

Provide heritage leadership through clear, consistent and reliable policies that are integrated with the overall planning framework. Offer effective and dependable heritage management tools and incentives that balance meaningful conservation with other City objectives.

#### Strategic Directions

- Streamlined processing
- Effective Incentives
- Supportive regulations and policies

### Program Components

- Planning and Regulatory Tools
- Support Tools
- Protection Tools

### *Goal 3 - Link Heritage to Other City Goals*

Enable the linkage and contribution of the environmental and socio-cultural benefits of heritage conservation to achieving other City goals, such as environmental stewardship, affordable housing and thriving community and cultural spaces.

### Strategic Directions

- Sustainable heritage conservation
- Apply heritage conservation lens on city priorities, initiatives and policies

### Program Components

- Greenest City Strategy
- Urban Forest Strategy
- Healthy City Strategy
- Housing Strategy

### *Goal 4 - Promote Public Awareness, Engagement and Support*

Promote enthusiasm and support for the celebration and protection of the city's historic places. Enhance public education and awareness of the Heritage Conservation Program.

### Strategic Directions

- Develop a strategic engagement plan to raise awareness
- Strategic Partnerships with government and non-government agencies and organizations

### Program Components

- Heritage Plaques
- Heritage Awards
- Public Advisory Committees
- Online and social media tools and resources
- Information Guides and Publications

These draft goals were presented to the public as part of the first round of public consultation. In the surveys completed during the open house, almost three-quarters of respondents supported the draft Vision and Goals to some degree. More specifically 72% of respondents supported (either fully or with some changes) the Vision and 71% of respondents supported (fully or with some changes) the Goals and Strategic Directions. The Strategic Plan will be further refined as work on the Heritage Action Plan continues throughout 2015 with recommendations to Council brought forward in the report due at the end of the year.

## 2. Heritage Register Upgrade

The Vancouver Heritage Register was adopted by Council in 1986 (then known as Heritage Inventory) and while it is updated annually with additions and deletions, there has not been a comprehensive review of the Register since its inception.

During the first phase of the work on the Heritage Action Plan an historic context statement and thematic framework were drafted (see heritage nomination webpage <http://vancouver.ca/home-property-development/nominate-a-site-to-the-heritage-register.aspx>). This was shared with the public at an event on May 23, 2015 at the Roundhouse which coincided with the launch of an online public nomination process for sites to be considered for possible addition to the Heritage Register running until mid-September. The May 23, 2015 “Heritage Reboot” event included a number of city departments and partner organizations who released/launched complementary initiatives as follows:

- City Archives - release of a digitized 1912 Fire Insurance Map of Vancouver.
- Heritage Vancouver Society - online building permit register which is a searchable database of building permits from 1901-1921.
- Vancouver Heritage Foundation - release of an online mapping tool showing sites on the Heritage Register which includes supporting documentation such as Statement of Significance for each site.
- Heritage Walking tours in the city and public lectures - such as Heritage Vancouver’s “Shaping Vancouver - Conversations on the Heritage Action Plan” including discussions on heritage conservation areas, and neighbourhood character.

Work on the Upgrade of the City of Vancouver Heritage Register will continue through 2015 as the consultant refines the historic context statement and thematic framework based on public input and expert panel review which will include historians and heritage consultants experienced with preparation of such documentation. The evaluation system for the Heritage Register will also be reviewed and a strategy to update the Register will be recommended. The consultant will review all public nominations for potential sites to be added to the Heritage Register and make recommendations on candidate sites to be submitted in the final report at the end of 2015.

## 3. Character Home Zoning Review

This part of the work entails two major components: the First Shaughnessy District Review which is subject of a companion report (RTS 10942) and the single family zone review to encourage character house retention.

Work on the character house zoning review is focussed on the RS-3/RS-3A and RS-5 zoning districts which are two of the districts with the highest proportion of pre-1940 houses (see Table 1).



Table 1. Pre-1940 houses in RS zones

RS Zoning District	Total Housing Sites	Pre-1940 Housing Sites	%
RS-1	52,165	9,282	17.8
RS-1A	183	60	32.8
RS-1B	149	10	6.7
RS-2	160	69	43.1
RS-3	395	218	55.2
RS-3A	183	133	72.7
RS-4	20	9	45.0
RS-5	11,867	6,067	51.1
RS-6	1,075	313	29.1
RS-7	2,085	1,370	65.7
Total	68,282	17,351	25.7

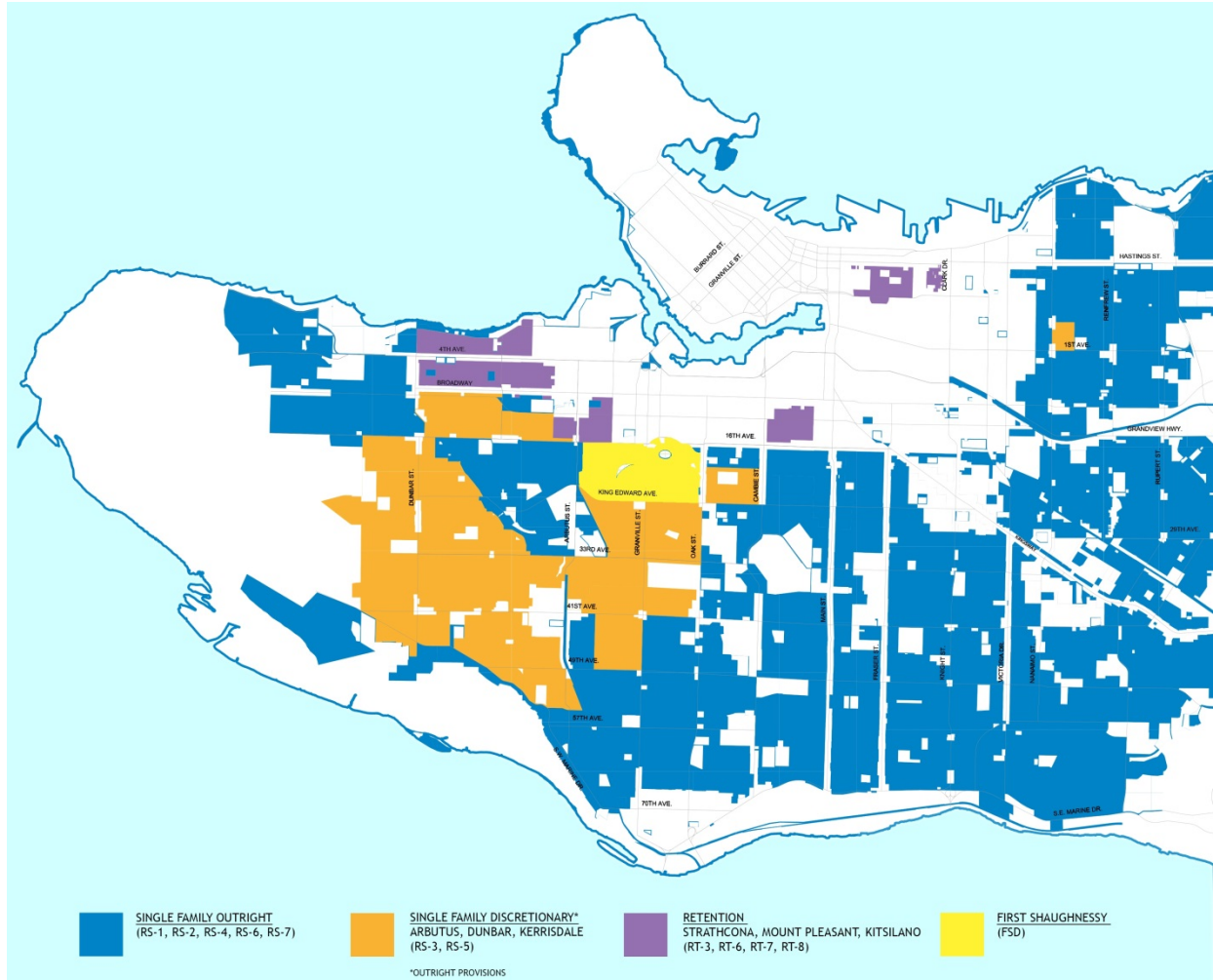
Of the 17,351 pre-1940 sites in RS zones, only 479 (2.7%) are listed on the Heritage Register.

Table 2. Pre-1940 Houses in select RT zones

RT Zoning District	Total Housing Sites	Pre-1940 Housing Sites	%
RT- 3 Strathcona	642	411	64
RT-6 Mount Pleasant	405	273	67
RT-7 Kitsilano	851	558	66
RT-8 Kitsilano	1544	1116	72
Total	3442	2358	69

Of the 3,442 pre-1940 sites in these RT zones, 574 (17%) are listed on the Heritage Register.

Map 1. Single Family and Retention Zoning Districts



In June 2014, Council approved an Interim Procedure to identify character buildings in the RS-3/3A and RS-5 zones which includes a criteria checklist to identify character and heritage houses. These zones have the highest proportion of existing pre-1940 homes as they were largely developed before World War II and this date is consistent with other retention zones in the city such as First Shaughnessy. The pre-1940 date is also being reviewed as the work on character homes will involve a comprehensive review and assessment of these single family character areas. Furthermore, the RS-3 and RS-5 zones contain conditional zoning provisions whereas RS-7, which also has a high proportion of pre-1940 homes, does not (only outright zoning permitted) and therefore was not included in the interim character home assessment procedure. Outright zoning includes a base zoning with no ability to gain more density or other considerations through design changes. In comparison, conditional or discretionary zoning allows for increased density, height and/or yard relaxations if a development meets design guidelines such as retaining neighbourhood built form and character including materials, livability, neighbourliness, etc.

As noted, the assessment of pre-1940 character homes is an interim measure while the consultant team explores options and tools to encourage retention of character houses in these zones. The character assessment procedure provides an opportunity to inform owners and applicants about retention opportunities available through existing zoning and/or heritage processes, but it does not prevent an applicant proceeding with redevelopment of a site under the outright provisions of the applicable zoning.

Since the adoption of the interim procedure, 326 character house reviews of the total of ~6500 pre-1940 homes in RS-3/3A and RS-5 zoned sites have been completed of which 252 have been deemed to be of character (77%). These reviews occur when owners bring forward enquiries and/or development permit applications for sites in the zones identified by the interim policy approved by Council. Of the 252 character sites identified to date, sixty sites have been the subject of permit applications, four of which have been for retention and renovation and the remainder for demolition under the outright zoning provisions.

Although the interim character assessment procedure has created greater awareness of character elements and features, the existing zoning does not provide sufficient incentive to encourage owners to retain character homes as evidenced by the number of demolitions of character homes occurring. Therefore, further work needs to be completed to develop mechanisms to encourage character home retention and discourage their demolition. Tools under consideration to encourage more character home retention are outlined below. To assist with focussing the work on character retention, public input was obtained through various consultation methods to obtain a better understanding of how the community defines character. Based on the response from the public consultation completed in the first quarter of 2015, there continues to be strong community support for retention of character buildings (see section 5 on Public Engagement).

A number of factors affect an owner's decision on whether to retain or construct a new building, including the differential between the outright and conditional provisions in the existing zoning. Outright applications are processed more quickly compared to conditional applications which would be subject to additional review to assess compliance with stated objectives and guidelines. At present the current zoning and guidelines in the RS-3 and RS-5 zones provide little incentive for retention as evidenced by the number of homes being demolished compared to the number being retained. In view of these initial results of the Character Home initiative, the consultant team has begun to evaluate options to encourage character house retention largely modelled on the RT zoning approach currently utilized in zones with a high proportion of pre-1940 houses such as Strathcona, Kitsilano, and Mount Pleasant (see Table 2). The zoning in these neighbourhoods encourages retention through incentives such as allowing additional floor area when buildings are retained and allowing them to be converted to multiple units. Furthermore the permitted floor area for new development is lower when a character building is demolished, further incenting retention of character buildings.

To inform the work to be completed by the consultant, the survey at the open houses sought input on the tools to encourage character house retention. The highest responses were as follows:

- increase floor area for retention (23%).
- identify character house concentration areas to focus retention incentives (19%).
- modify building site requirements such as providing relaxations to yards and setbacks (13%).

The consultant will assess various development scenarios on typical lot sizes and house sizes including options for sites with character houses smaller than and at/or near the floor area permitted by zoning. Options under consideration to encourage character home retention include:

- increase the permitted floor area allowed when a character home is retained and reduce permitted floor area for new development (to discourage demolition).
- increase allowable floor area for laneway houses, if character house is retained.
- allow a character home to be converted to more than one unit (multiple conversion dwelling) which could be strata.
- permit stratified infill units on properties only when retaining a character home and subject to heritage protection through a Heritage Revitalization Agreement.
- allow smaller lots through subdivision which could make retention more viable
- tools to encourage greater landscape retention, which has been identified as an important element of neighbourhood character through public consultation.

The analysis will consider built form and the land economics of these options, the overall impact on housing affordability and how to calibrate the incentives. As the consultant team develops options over the coming months, opportunities for public input will continue through open houses, stakeholder meetings, and workshops.

#### **4. Sustainability Initiatives**

##### **a. Construction and demolition waste strategy and review**

In June 2014, Council approved the Construction and Demolition Waste Diversion Strategy (RTS 10598). The first stage of its regulatory program proposed requiring minimum reuse and recycling of 75% of demolition waste from pre-1940 homes, and requiring recycling of 90% of demolition waste from pre-1940 character homes which are proposed to be demolished. The higher obligation for character homes was to incent the preservation of character elements in the deconstruction of the homes and the establishment of a re-use capacity.

The Green Demolition By-Law (No. 11023) implementing these requirements came into effect on September 1<sup>st</sup>, 2014. Table 3 below summarizes the statistics for the first nine months of By-Law implementation (September 2014 - May 2015). During this time City Staff have also conducted direct industry engagement with demolition and general contractors, reuse store owners, and recycling facility operators in order to build capacity within this business sector to achieve the objectives of the Green Demolition By-Law.

Table 3. Summary of applications for pre-1940 homes - Construction and Demolition Waste Diversion Strategy (September, 2014 - May, 2015)

<p>Total number of complete* pre-1940's demolition projects: 97**</p> <ul style="list-style-type: none"> <li>• Subject to 75% requirement - 78 (80%)</li> <li>• Subject to 90% requirement - 19 (20%)</li> </ul> <p>* Project is complete when a Compliance Report has been received demonstrating recycling performance.  ** One hundred more projects subject to these requirements are in process, but not yet complete.</p>
<p>Performance of completed projects:</p> <ul style="list-style-type: none"> <li>• Met recycling requirement - 88/97 (91%)</li> <li>• Non-compliant* - 9/97 (9%)</li> </ul> <p>* During the introductory phase of By-Law implementation, demolition contractors on non-compliant projects are required to have follow-up meetings with City staff where the importance of the recycling requirement is emphasized. Contractors are provided information to assist their performance on subsequent projects and advised about future penalties. A refundable \$15,000 performance deposit is now in effect (for applications accepted after March 1<sup>st</sup>, 2015). Staff expect this refund hold-back for under-performing projects will encourage even better recycling performance.</p>

The following have been achieved since the Green Demolition By-law was adopted:

- Established permitting and compliance process to manage implementation of the Green Demolition By-Law.
- Increased industry awareness and raised profile for material reuse and recycling.
- Have begun shifting industry toward more systematic approaches to building removal that provide for better material reuse and recycling.
- Results:
  - 91% compliance rate on completed projects.
  - Over 2700 tonnes of wood recycled in first 9 months of program.

In addition, the following observations have been made:

Regarding character home retention:

- Demolition waste recycling requirements cannot singlehandedly drive retention of older homes in Vancouver. These requirements are an important tool that should be used in conjunction with incentives to retain character homes to be described in the Heritage Action Plan.

Regarding material reuse and recycling:

- Recycling requirements successfully ensure materials get recycled and increase the likelihood that important character elements are salvaged and reused. Efforts to build the construction materials recycling and reuse sector have shown promise and will continue and be expanded.
- While the Green Demolition By-Law ensures most demolition material no longer goes directly to the landfill, many contractors are still demolishing buildings using

traditional mechanized techniques. These approaches can damage materials and limit reuse opportunities. Mechanized techniques also produce mixed demolition waste that then requires significant sorting and separation at a recycling facility. Even better outcomes will be achieved when more systematic disassembly of houses (deconstruction) and on-site sorting of building materials becomes the industry standard. Staff are working to support more training and outreach to build deconstruction expertise within the industry sector in order to improve overall performance.

The next steps involve:

- Continue to track the metrics associated with the new Green Demolition Bylaw and assess results.
  - Continue to engage with the demolition and the recycling industry to improve their technique, approach and outcomes.
  - Undertake research to identify opportunities and barriers to reuse of recycled demolition wood waste.
- b. Pilot Energy Retrofit Incentive Program for heritage and character houses

When Council approved the Heritage Action Plan, the Plan included the need to integrate the Energy Retrofit Program for Existing Buildings into the Plan. Incentives related to this Program might encourage reinvestment in these buildings and foster retention by making them more comfortable and affordable to occupy. In 2014, a study “Greening a Heritage Building” was completed through the Greenest City Scholar Program initiative and further analysed by the City’s Sustainability Group with feasibility work done in the field by the Vancouver Heritage Foundation (VHF). This work provides a solid data base for the proposed Pilot Program - “Energy Efficiency Improvement Grants Program for pre-1940 and Heritage Register homes”.

There are approximately 17,000 homes in Vancouver that were constructed prior to 1940 (refer to table 1). Of these, approximately 10,000 are believed to be owner-occupied and could see significant gains in sustainability made through energy efficiency upgrades. Many of these homes may be considered character homes contributing to the character of their streetscapes and neighborhoods and subject of efforts to encourage retention rather than replacement. Data from energy improvement retrofits of 8,000 Vancouver houses indicate a correlation between GHG savings and the date of construction. The largest savings were found for houses constructed prior to 1910. For houses constructed prior to 1945 including heritage and character homes the average GHG reduction was 39% or 4.65 tonnes of CO<sub>2</sub>/year.

BC Hydro and Fortis BC presently offer incentives through the Home Energy Rebate Offer (HERO) program. The HERO Program is focused on energy efficiency and not on carbon reduction. The Program is the successor to the former Provincial LiveSmart and the federal EcoEnergy programs. The City is currently working with the two utility partners to identify opportunities to optimize the program. Given the importance of reducing

emissions from existing homes in Vancouver, this pilot is a key way to do a small trial of the direct emissions reduction incentive.

The proposed pilot program would:

- focus on carbon reduction as well as energy efficiency.
- augment the HERO rebates for the highest priority upgrades.
- encourage measures that are heritage and character sensitive, appropriate for older construction and sympathetic to retaining historic elements in the home.

This pilot will complement the HERO program with heritage appropriate upgrades while providing a template for a new approach to retrofit incentives that could be applied and scaled to include other housing types that the City and utilities can consider.

The Pilot Energy Retrofit Incentive program would start in mid-2015 and be open for applications for six months or until the target number of 20 pre-1940 participating homes has been achieved. The program will then operate for a year while renovations to homes are completed. Grants will be based on energy efficiency improvements identified through an energy audit and implemented by the homeowner payable at a value of \$25/tonne of the modelled GHG reductions resulting from their interventions to a maximum value of \$3,000 for a single grant. These grants would be incremental and co-ordinated with HERO rebates.

For example, if a typical pre-1940 home, with no wall insulation, upgrades to R13.6 they would receive a \$1200 rebate from the province and a \$500 rebate from the City pilot program. If at the same time the house is upgrading their heating system from gas furnace to air source heat pump they will get \$0 from HERO and \$2500 from the City pilot program. Overall this house will reduce its annual carbon footprint by about 16 tonnes annually and the City pilot incentive makes the case for the upgrades compelling enough for action.

Eligibility criteria for the pilot program will be established but key assumptions include:

- The goal is to achieve the most significant reduction possible for each home using a tool developed with City Green (BC's largest non-profit energy efficiency service organization who focus their work on single family homes <http://www.citygreen.ca/city-green-solutions>);
- Agreement by the homeowner that the test results and utility data, achieved through evaluations by the Certified Energy Advisor before and after the completion of upgrades, will be shared with the City;
- All upgrades will be subject to the use of a simple calculator tool to make sure the energy upgrade reduces carbon within the cost threshold that the City has deemed acceptable.
  - Most if not all homes which use natural gas or oil for heating will be eligible, however electrically heated homes would not be eligible. (note: electrically heated single family homes make up less than 5% of all homes and will be excluded from the pilot).
- The grant will not aim to cover the full cost of upgrades but to make them more affordable.

The program has been developed through a partnership of the Sustainability Group with the Heritage Conservation Program and the Vancouver Heritage Foundation (VHF). The VHF has considerable experience in managing and administering grant programs targeted to homeowners through their True Colours and Restore It grants for the past 14 years. The program will be managed by the VHF in consultation with the City, and its promotion will be done through both Heritage Foundation communication channels as well as the City of Vancouver website, and through media releases. City Green will assist with technical advice on program launch and marketing through their network.

### ***Financial***

An estimated total budget for the program is \$76,750, as outlined in the table below. The funding for this program is a \$3,500 in-kind contribution from the Vancouver Heritage Foundation, together with a City of Vancouver grant of up to \$73,250 to the Vancouver Heritage Foundation.

The source of funding for the grant is \$65,000 from the Sustainability 2015 operating budget and \$8,250 from the Planning and Development Services 2015 operating budget.

#### **Program Expenses:**

Funds for distribution as grants	\$60,000
VHF development of program details	3,000
VHF implementation of program launch	4,250
VHF management of program June - November	9,500
Total Costs	<u>\$76,750</u>

#### **Program Funding:**

In Kind - Vancouver Heritage Foundation	\$ 3,500
City of Vancouver Grant	
Sustainability Operating budget	65,000
Planning and Development Services Operating budget	8,250
Total funding	<u>\$76,750</u>

Approval of Recommendation B would provide a grant to the Vancouver Heritage Foundation of \$73,250 which would include funds for disbursement of grants, program development, launch and management costs and a report back on the program results.

## **5. Public Engagement, Awareness and Advocacy Initiatives through the Heritage Action Plan Process**

A number of initiatives are designed to further engage the public, make information more accessible and encourage public discourse on broad heritage conservation issues as well as more technical matters. The following publications have been prepared to interpret and



explain Vancouver Building By-law provisions as they would apply to heritage and character buildings.

- The new Vancouver Building By-law (VBBL) became effective on January 1, 2015. In response to concerns about potential impacts of new VBBL on heritage and character buildings, the Chief Building Official has issued a bulletin to clarify the flexibility available to heritage and character building owners  
<http://former.vancouver.ca/commsvcs/LICANDINSP/bulletins/2014/2014-007.pdf>.

In addition to the Part 11 provisions which provide alternative compliance methods for heritage and character buildings, the bulletin states that if the heritage conservation work does not create an unsafe condition or reduce the level of performance of the building and is required to maintain the heritage character of the building, it will be accepted. The bulletin also provides for further relaxation provisions provided the unsafe conditions are not created and that an acceptable level of performance can be achieved.

- *An Introduction for Homeowners to the 2014 Vancouver Building By-law* (see Appendix B). As a further initiative to improve public awareness of the VBBL and heritage and character homes, the Vancouver Heritage Foundation, in consultation with the City, has produced a brochure to assist homeowners of heritage or character homes in understanding and following VBBL requirements. The brochure provides general guidance on how to meet VBBL requirements and retain heritage features and fabric of homes. The brochure will be made available on-line (via the VHF website) and at the service counter in the West Annex of City Hall.
- Public Forums: Other activities by partners such as the Vancouver Heritage Foundation and Heritage Vancouver have focussed on providing information via lectures and panel discussions with guest speakers and tours to increase public awareness.
- Public Advisory Committee: As Council directed, a committee was established, composed of representatives from Council appointed advisory bodies such as the Vancouver Heritage Commission, Vancouver Heritage Foundation, First Shaughnessy Advisory Design Panel, Chinatown Historic Area Planning Committee, Gastown Historic Planning Committee, Urban Design Panel, Vancouver City Planning Commission, as well as other heritage and stakeholder groups including Heritage Vancouver, Greater Vancouver Homebuilders, Urban Development Institute, Shaughnessy Heights Property Owners Association, Real Estate Board of Vancouver.

Over the last months, a robust public consultation program has been implemented which has provided a diversity of in-person events (open houses, stakeholder meetings, practitioner roundtables), the use of online tools (web page, list serve, surveys, social media) and partner-led engagement opportunities. Through this multi-faceted process, a high level of engagement has been achieved. To date the following consultation activities/events have been completed:

## Stakeholder/Advisory Group Consultation

- 8 HAP Public Advisory Committee meetings
- 15 Stakeholder and Advisory group meetings
- 4 learning sessions/practitioner round-table discussions with approx. 42 invitees
- 2 information sessions for First Shaughnessy
- 3 open houses (240 attendees)
- Heritage Reboot (launch of online research tools including Heritage Register Upgrade)

## Online Surveys

- Talk Vancouver - 1125 respondents
- Survey on open house information (Feb./March) - 120 responses

There continues to be strong public support for heritage conservation based on the results of the Talk Vancouver survey where 1125 responses were received. Some of the key findings from the survey are as follows:

- 94% place a lot (74%) or some value (20%) on historic places and heritage buildings.
- 90% feel heritage buildings contribute a lot (69%) or somewhat (21%) to a sense of place.
- 97% agree we need to preserve heritage buildings in Vancouver (73% a lot/ 24% yes, but select/important ones only).

Through the Talk Vancouver survey (1125 responses), respondents stated the four highest responses to describe character as follows:

- parks and green space (83%).
- buildings (82%).
- landscape (78%).
- local businesses/shops (74%).

Comments were also obtained through activities at open houses where attendees were asked to respond to the question “what does character mean to you?” The responses can be summarized as follows:

*“A reoccurring response from the public was that character is not just a building, but rather the collection of buildings, structures, landscaping, streets and corners that create a character area, generating an identity of a neighbourhood. Respondents indicated that these characteristics are what make neighbourhoods unique and distinct from one another and worth preserving.*

*We also heard that the built environment and street character are directly correlated to the social interactions of neighbours, and that these interactions contribute to the character of a neighbourhood. Respondents identified features of homes and streets that support social interaction, such as porches, short setbacks, gardens, and front yard play space.” (Donald Luxton and Associates)*

A summary of responses to the Talk Vancouver survey and the public open house questionnaires is available on the Heritage Action Plan webpage [www.vancouver.ca/heritage-action-plan](http://www.vancouver.ca/heritage-action-plan) (see the “Documents” tab).

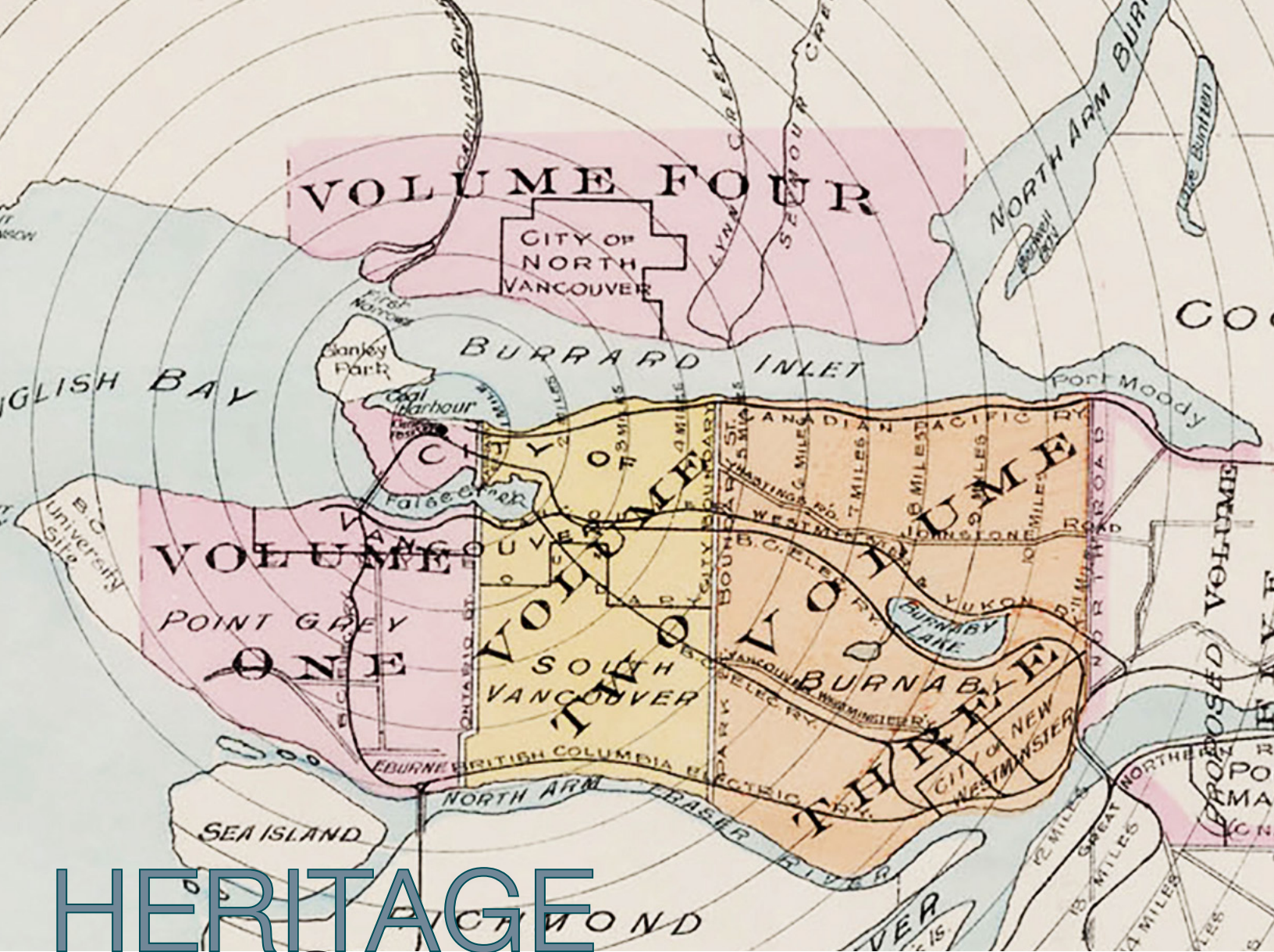
In addition, an interdepartmental technical committee has also been established to provide input and oversight to the consultant's work, as well as to guide and coordinate recommendations to Council.

### ***CONCLUSION***

As noted in this report the Heritage Action Plan is well underway. There have been number of consultation events and activities to seek public input and partner groups have organized events to broaden public awareness and discussion.

The next phase of the work includes updating the Heritage Register, the character house zoning review, and completing the overall review of the heritage conservation program. This is now underway and the consultants work is anticipated to be completed by the end of the year after a report to Council will be forthcoming.

\* \* \* \* \*



# HERITAGE ACTION PLAN

BEST PRACTICES OF MUNICIPAL HERITAGE PROGRAMS

JANUARY 2015

**DONALD LUXTON**  
AND ASSOCIATES INC



Appendix A

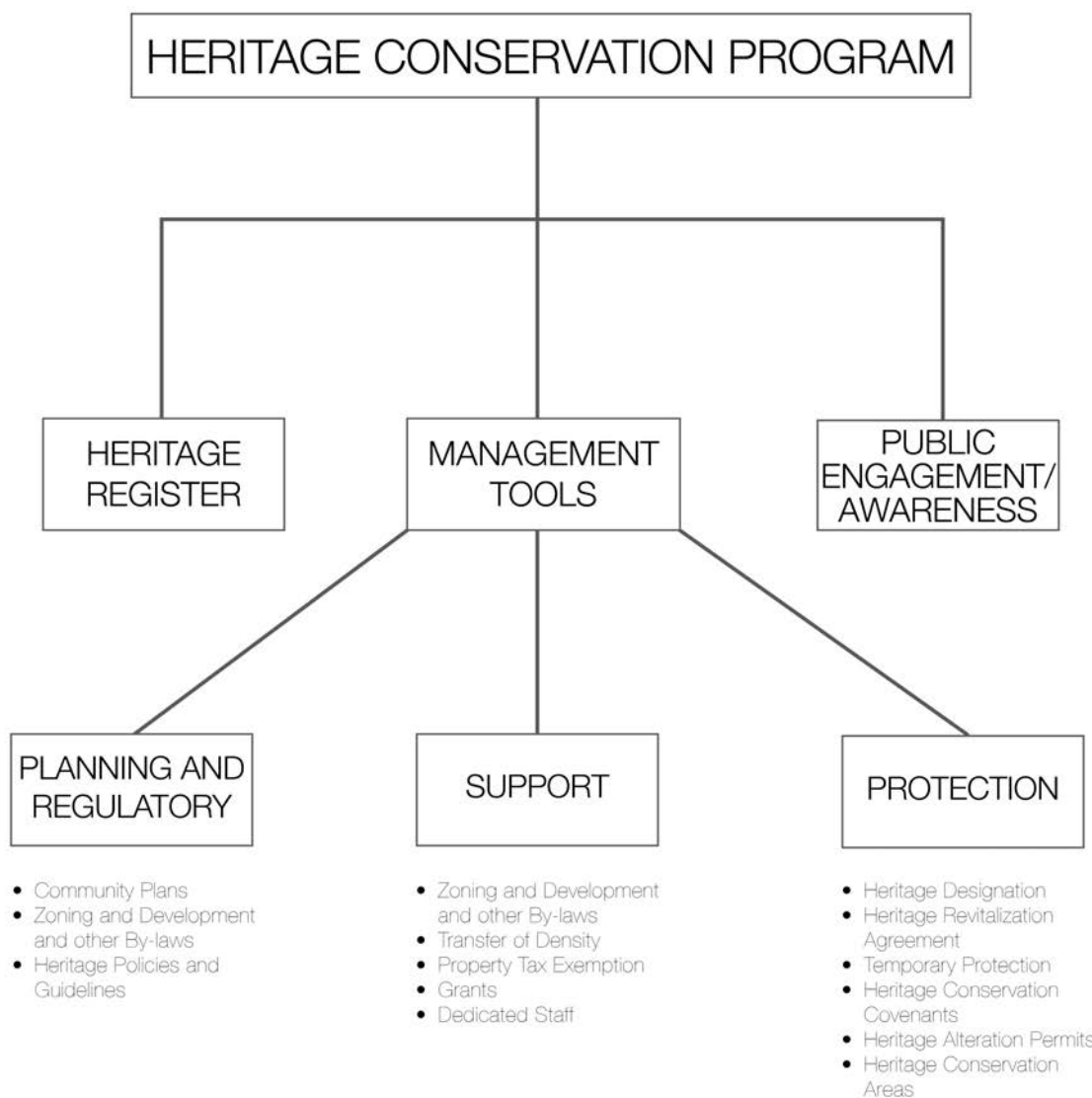
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## INTRODUCTION

This document begins with an examination of Vancouver’s current program and its components. Several municipal heritage programs were analyzed in order to determine which of their best heritage planning practices could be applicable to the City of Vancouver Heritage Conservation Program. The selected programs present the best opportunities for further exploration as components of Vancouver’s Heritage Action Plan. These municipal programs, located in Canada, the United States and Australia provide aspirational examples of potential policy directions for Vancouver.

## CITY OF VANCOUVER PROGRAM STRUCTURE



**\*Management Tools** are enabled by the *Vancouver Charter*. Heritage Conservation Areas are not currently utilized, but are being explored as a potential intervention in certain historic districts.

## BEST PRACTICE CASE STUDY: VANCOUVER



**Population:** 603,502

**Heritage Conservation Program Establishment:** 1983

**Number of sites on the Heritage Register as of 2010:** 2,172

**Advisory Body:** Vancouver Heritage Commission

**Overall Program Description:** Vancouver's Heritage Conservation Program was formally established in anticipation of the City's Centennial in 1986. The Vancouver Heritage Resource Inventory was undertaken in two phases from 1983-86, and recognized that a significant heritage legacy had accumulated, which represented the broad sweep of Vancouver's settlement, growth and development. Heritage resource management was also recognized as a legitimate function of city planning. Since 1986, the City has continued to increase its commitment to the Heritage Conservation Program, which has developed to include a wide range of management tools and conservation incentives. In addition, subsequent studies have identified further value in specific resource categories such as heritage interiors, post-1940s sites, heritage areas and historic infrastructure and, most recently, schools. The City of Vancouver has stayed in the forefront of this evolving situation and is now in the process of reviewing and upgrading its Heritage Conservation Program to reflect this rapidly changing context.

### **Program Components:**

- **Heritage Register:**
  - More than 2,000 sites with heritage value have been included on the list; potential heritage sites are evaluated using a standardized methodology. Sites listed on the Heritage Register currently include buildings, structures, streetscapes, landscape resources and archaeological sites
- **Neighbourhood Planning:**
  - **Heritage Zoning Districts** apply to the historic areas of Gastown, Chinatown and Yaletown. First Shaughnessy has a distinct Official Development Plan that includes a focus on heritage conservation and a list of pre-1940 resources, passed by resolution of Council.
  - **Zoning guidelines** encourage the retention of heritage and/or character resources in neighbourhoods including Strathcona, Mount Pleasant and Kitsilano.
  - Community Planning projects encompass the development of **Historic Context Statements** and **Thematic Frameworks**, which together illustrate the historic forces that have shaped neighbourhoods over time.

- **Protection Measures:**
  - **Legal Designation** on title protects heritage resources after they have been conserved in exchange for zoning or development relaxations or incentives.
  - **Heritage Alteration Permits** are required for legally designated properties when any changes are proposed.
- **Incentives:**
  - A **Transfer of Density** program has allowed heritage resource owners to sell unusable development density in exchange for conservation and legal designation; this has resulted in the establishment of a density bank.
  - The **Heritage Building Revitalization Program (HBRP)** was designed to encourage property owners in Gastown and Chinatown to conserve their heritage buildings in exchange for incentives, including grants for the rehabilitation/restoration of historic façades and/or property tax exemptions.
  - **Heritage Revitalization Agreements (HRA)** can be negotiated between property owners and the City. Through an HRA, the City is able to offer incentives, including relaxed zoning requirements and/or increased development potential, in exchange for the conservation and legal designation of a property.
  - The **Vancouver Heritage Foundation (VHF)**, an arm's length organization, awards modest grants to homeowners for the conservation of historic properties. The VHF also offers a range of heritage awareness and education programs for the public.



## BEST PRACTICE CASE STUDY: EDMONTON



**Population:** 877,926

**Heritage Conservation Program Establishment:** 1980

**Approximate number of Municipally Designated Sites:** 94

**Approximate number of sites on Register:** 692 + an additional 71 resources listed as either 'Fort Edmonton'; 'Landscape'; 'Cemeteries/Monuments'; 'Street Furnishings'; 'Architectural Fragments'

**Overall Program Description:** Council gave Planning and Development the responsibility to create a *Historic Management Plan* for the City of Edmonton in 1980. The City created the Register of Historic Resources in Edmonton in 1984, which listed only buildings in the City's downtown, expanded in 1988 to include significant buildings across the entire city. The citywide inventory and subsequent Register was officially reviewed and adopted in 1993.

The Register is comprised of registered and designated buildings and includes appendices listing significant architectural fragments, landscapes, Fort Edmonton Park buildings, cemeteries and monuments.

The City also passed a policy in 1988 to offer financial incentives through tax incentives or grants thereby encouraging owners to designate their properties. In 1995, an Historic Resources Review Fund Account was created to ensure a secure source of funding would be available. In 2001, this fund was increased and another Heritage Officer was hired.

In 2005 the *Historic Management Plan* was updated for several reasons:

- To align with the *Standards and Guidelines for the Conservation of Historic Places in Canada* (2003), which had been adopted by the Province of Alberta in 2003;
- To reformat the Register due to the increase of designated and registered buildings since the *Plan's* creation thirteen years before;
- To recognize additional resources that had been identified during a three year study of Modern Heritage (1930-1960); and
- The evaluation and documentation standards for historic resources in Edmonton were changed from a numerical system to a qualitative, values-based, approach.

*The Way We Grow* (2008), a municipal development plan that received first reading in late 2008, provides for much stronger protection of historic and cultural resources in Edmonton. The policies to achieve the plans stated objective include:

- Integrate heritage conservation into the broader context of planning and decision making;
- Ensure new development adjacent to properties on the Register and Inventory of Historic Resources in Edmonton respects the scale, massing, proportions and character of existing buildings;
- Support conservation and adaptive reuse of historic resources through creative design solutions and incentives;
- Ensure all City owned historic resources are conserved and maintained in a good state of repair;
- Support policies and actions outlined in the Historic Resource Management Plan;
- Develop an archaeological plan or overlay that identifies significant sites and serves as a reference during the development application process;
- Create an inventory of significant cultural landscapes and develop a method of protecting them;
- Develop regulations to identify, guide and protect the character of historic areas or districts; and
- Seek innovative design approaches to reflect and embrace the culture of Edmonton's new and emerging minority groups.

Each site considered for addition to the Register must be evaluated for its significance, regardless of age. The *Historical Resources Act* empowers municipalities to designate and regulate historic resources or areas. Section 28 of the Act requires municipalities to compensate owners of designated Municipal Historic Resources.

**Program Components:** The City of Edmonton has a *Historic Resource Management Plan* (2009), which outlines the mission for the City's heritage program:

*To identify, facilitate, protect, manage and promote the preservation and reuse of historic resources to enhance the quality of Edmonton's environment for the benefit of present and future generations.*

Historic sites on Edmonton's Register are afforded some protection by being flagged in the City's management system when any development issues arise. This enables the Heritage Officer to seek ways to save the buildings or ensure appropriate redevelopment occurs. All resources on the Register and Inventory are also eligible for a variety of incentives that will enable them to be restored or rehabilitated. After sites are legally designated, City Council has the authority to review any development matters and to intervene should it feel inappropriate work is being conducted on the Municipal Historic Resource.

Using the *Historic Resource Management Plan* the City merged the 'A' list with the 'B' list to ensure all sites on the Register are treated equally.

Edmonton's Register is organized by neighbourhood and includes tombstone research on each site including address, historic name, date of construction, and architect/builder.

**Tools:** Heritage Register; Heritage Inventory; Historical Resources Management Plan; City Policy C-450B: *A Policy to Encourage the Designation and Rehabilitation of Historic Resources in Edmonton*; *The Standards and Guidelines for the Conservation of Historic Places in Canada*; *The Art of Living: A Plan for securing the future of arts and heritage in the City of Edmonton*

**Incentives:**

**Grants:** In 1995, Edmonton City Council approved the creation of a fund to provide financial compensation for the designation of Municipal Historic Resources. Funds are withdrawn annually from the operating budget of the Planning and Development Department into a reserve account. Monies unspent in a calendar year are retained in the reserve fund for future years. These funds are used to provide an incentive to designate, rehabilitate, preserve and promote Municipal Historic Resources. The incentives given include direct grants, property tax rebates and non-monetary incentives.

These grants given to owners of Municipal Historic Resources will pay for themselves through long-term tax benefits. On average, most of the grants that have been provided have been recovered over a 5 to 10-year period. The creation of vibrant buildings also stimulates new growth and investment in the surrounding areas over time, which in turn generates greater economic activity and subsequently, taxable revenues.

**Specifics:** The City of Edmonton receives \$877,000 from Council each year for the heritage conservation grant program; unused funds are carried over. Grants are awarded according to the following procedure and guidelines:

- Buildings that are already designated are eligible for ongoing maintenance incentives from the City and Province.
- Upon receipt of the application the amount of work to restore the building is determined and an agreement between the owner and City is made. This agreement outlines the incentive level agreed upon and what portions of the building are to be protected by caveat.
- Financial Incentives are awarded according to the following for eligible work:

<b>Residential Buildings</b>		<b>Commercial Buildings</b>	
<b>Rehabilitation Incentive</b>	50% of project costs, to a max of \$75,000	<b>Rehabilitation Incentive</b>	50% of project costs (determined on a case by case basis)
<b>Maintenance Incentive</b>	30% of project costs, to a max of \$10,000, renewable every 5 years	<b>Maintenance Incentive</b>	30% of project costs, to a maximum of \$50,000, renewable every 5 years

Further information:

- The City receives roughly between 5 and 10 applications for designation per year
- The maintenance incentives have proven to be the most attractive, especially for single-family home owners
- Designated buildings also qualify for up to \$100,000 in maintenance incentives from the Province of Alberta

Other than direct investment into the property, there are trade and construction spin offs as well as other long-term benefits to the character and economic well being of the city.

Incentives recommended in 2009 include:

- Explore other funding sources to ensure additional incentives are available to assist with restoration costs;
- Develop a program to provide for ongoing maintenance to Municipal Historic Resources;

- Provide funding to remove graffiti from historic resources, with a priority given to designated buildings;
- Explore the feasibility of developing storage facilities for significant architectural remnants that may be salvaged from demolitions, so that they may be incorporated into new development in the future;
- The City should identify resources to enable the purchase, restoration and sale of historic resources for the specific purpose of saving the building; and
- Explore how the City could facilitate training in restoration techniques for owners of historic resources as part of incentives or broader initiatives.

**Heritage Awareness:**

- *This Old Edmonton House* seminars help owners of historic properties of public seminars with advice about owning, maintaining and restoring an historic home.
- Founded in 2009, the **Edmonton Heritage Council's** mandate is to:
  - provide a forum for analyzing, discussing and sharing heritage issues in Edmonton
  - advocate for a vibrant heritage community and heritage programs that benefit all Edmontonians
  - unify Edmonton's heritage community and give it a voice
  - promote the awareness and development of effective, informed and recognized heritage principles and practices.

## BEST PRACTICE CASE STUDY: VICTORIA



**Population:** 80,017

**Approximate number of sites on the Register:** ~1,100

**Heritage Conservation Area(s):** 13

**Heritage Register:** Established in 1982

**Advisory Body:** Heritage Advisory Panel

### **Incentive Tools:**

- Heritage Register
- Heritage Inventory
- Heritage Alteration Permits
- Heritage Designation Application
- Heritage Tax Incentive Program (residential and non-residential)
- Heritage Strategic Plan For The City of Victoria
- *Official Community Plan* containing *Standards and Guidelines for the Conservation of Historic Places in Canada* as well as the 13 heritage conservation areas (HCA)

**Financial Incentives:** The City of Victoria has grant programs for improvements to designated heritage houses and designated commercial, industrial, and institutional properties

### The House Grants Program:

*The House Grants Program of the Victoria Heritage Foundation (VHF) promotes the preservation of heritage-designated residences in Victoria by assisting their owners with the costs of restoration and repair of their buildings.*

*Each year, the VHF receives funds from, the City of Victoria and allocates them to homeowner applicants. Owners are restricted to one application per fiscal year per property, but a grant application may contain more than one project. If a grant is approved, the work must be completed within the calendar year.*

*The House Grants Program may cover a portion of project costs, subject to VHF priorities and the availability of funds. Applications for up to \$500 for emergency repairs are reviewed on an individual basis.*

**In 2013:**

- 53 projects totaling \$182,242 in grants were funded
- homeowners invested a minimum of \$520,691
- maximum eligible project costs was \$20,500
- grants were 35% of project costs
- the average grant was \$3,438
- for every \$1,000 grant, leverage to the community was \$2,860

**The Building Incentive Program (BIP):**

*The Building Incentive Program (BIP) (administered by the Victoria Civic Heritage Trust) provides financial assistance to owners of commercial or institutional heritage designated buildings to assist with facade restoration; structural improvements, upgrading required by building codes, and other rehabilitation costs. Grants may cover up to 50% of the cost of eligible heritage work, up to a maximum of \$50,000 per project. Grants are subject to the availability of funds and the number of applicants.*

**Tax Incentive Program for Downtown Heritage Buildings:**

*Tax exemptions up to 10 years are available to eligible owners of Downtown Heritage Designated buildings. The Tax Incentive Program (TIP) is available to offset eligible seismic upgrading costs specific to the conversion of existing space to residential uses or for the rehabilitation of existing Heritage-Designated buildings for uses other than residential, for example:*

- *Professional design and engineering reports, drawings, cost estimates, and specifications as required for the project.*
- *Seismic upgrading of building components, including Code upgrading, bracing of walls, floors, and roof systems, masonry reinforcement, affixing of cornices or other exterior architectural features to the building structure, etc.*

Projects eligible for the City of Victoria Tax Incentive Program will be subject to the following calculation:

$$\text{Term of tax exemption} = \frac{\text{Cost of seismic upgrading}}{\text{Current taxes}}$$

(# of years)

Following project completion, the project will be exempt from property taxes for the specified number of years. The actual value of the exemption will be determined by the revised assessment determined by the B. C. Assessment Authority and the current year's tax rate for each year.

*Example:*

A building being proposed for rehabilitation needs \$200,000 worth of seismic upgrading. It currently pays \$20,000 per year in property taxes. The maximum eligible term of exemption, which City Council may approve, is therefore:

$$\begin{aligned} \text{Seismic Upgrade Cost } \$200,000 &= 10 \text{ Years} \\ \text{Current Annual Taxes } \$20,000 & \end{aligned}$$

The B. C. Assessment Authority provides an estimate of the increased property assessment resulting from the rehabilitation that results in a potential increase in annual taxes to \$42,000 per year. The actual value of the exemption may amount to (estimate)  $\$42,000 \times 10 \text{ years} = \$420,000$ .

**Heritage Awareness:** Victoria Heritage Foundation, Victoria Civic Heritage Trust, *This Old House: Victoria's Heritage Neighbourhoods* Publications, The Hallmark Society, the Victoria Historical Society, the Old Cemeteries Society. Victoria also offers a number of educational programs and material available to the public including: DIY Brochures; Walking Tours; Heritage Promotional material; Conferences; University of Victoria Cultural Resource Management Program.

## BEST PRACTICE CASE STUDY: MONTREAL



**Population:** 1,680,000

**Heritage Databases** (not available in English): The Montréal heritage databases comprise hundreds of records, illustrated with period or contemporary documents, on the history and architectural or urban features of the city's buildings, heritage districts, place names and much more.

**There are four databases:** one on built heritage, one on municipal properties of heritage significance, one on the heritage of Old Montréal in detail, and one on the history of Montréal place names.

**Overall Program Description:** In Montreal, heritage means any asset or group of assets, natural or cultural, tangible or intangible, that a community recognizes for its value as a witness to history and memory, while emphasizing the need to safeguard, to protect, to adopt, to promote and to disseminate such heritage.

In May 2005, City Council adopted the *Heritage Policy*, responding to a need expressed through the decades by Montrealers and reaffirmed during the *Sommet de Montréal*.

The objective of the policy is to organize and orient the actions of the city and its partners in order to encourage the development of a collective vision and a shared responsibility for Montréal's heritage and to make heritage a lever of cultural, social and economic development. The policy envisions municipal activities in the following areas:

- Establishment of a system of organization for heritage-related actions.
- Implementation of this organization by ensuring that the city serves as a model owner and administrator.

### **Definitions of Heritage:**

Héritage Montreal - protects sites of interest beyond purely built heritage such as landscape, ecological, archaeological and commemorative value.

#### **The notion of heritage**

The city endorsed the general definition of heritage that was produced by the *Conseil du patrimoine de Montréal* and that appears in the *Énoncé d'orientation pur une politique du patrimoine* (heritage policy directional statement).



*Heritage means any asset or group of assets, natural or cultural, tangible or intangible, that a community recognizes for its value as a witness to history and memory, while emphasizing the need to safeguard, to protect, to adopt, to promote and to disseminate such heritage.*

Montréal's *Heritage Policy* takes into account natural, tangible and intangible cultural heritage, or in other words, all aspects of heritage as defined by UNESCO. The Policy thus subscribes to the major international principles employed in classifying heritage. These principles have been tailored to Montréal's particular situation, as well as to the context of the municipality's jurisdiction in order to ensure a practical implementation of the Policy, which covers the following kinds of heritage:

**Natural heritage**

Primarily consists of natural systems and sites, eco-territories, and riparian and aquatic environments. It includes Montreal's major physical, biological and hydrographical formations, as well as natural environments, thereby ensuring a balance for the plants and animals living in an urban setting.

**Tangible Cultural Heritage**

- **Public art**

Includes all works of artwork located in urban settings, such as public squares and parks, as well as work integrated into street furniture, buildings and landscaping. Such works consist primarily of sculptures, monuments, murals and landscape features

- **Archaeological heritage**

Includes layers of soil, remnants, unearthed artifacts and all other traces of human existence from sites in which human activities have been conducted. Such sites include structures, constructions, groups of buildings and developed areas, along with their surroundings and any artifacts associated with them.

- **Archival heritage**

Includes plans, photographs, films, sound and computer recordings and written documents attesting to creations by a large number of people and institutions that have been active in Montreal. It comprises the documents produced or received by individuals or organizations for meeting their needs and for carrying out their activities, that were preserved for the general information such documents provide.

- **Built heritage**

Includes different urban structures and components of these structures that are typical of Montreal, such as the network of roads, infrastructure and other components that contribute to structure the public domain, buildings and building complexes, and the distinguishing features of these sites and the various ways in which they fit into the landscape. Built heritage also includes different kinds of properties that relate to lifestyles or to specific uses within a given socio-historical context.

- **Movable heritage**  
Includes municipal collections that are artistic, archaeological, documentary, ethno-historical and scientific in nature. The category includes creative works, along with archaeological artifacts, plant and animal specimens and corporate, industrial and street furniture.
- **Landscaped heritage**  
Includes developed sites and complexes such as parks, squares and public or private gardens, prominent trees and shorelines. Such features, along with those contained in Montreal's natural, built and archaeological heritages, define the city's landscapes. These productions are the result of the combined works of nature, human beings and the achievements of certain renowned designers, and are based on a concept of landscape that comprises notions of nature and of culture, as well as the manner in which a community perceives, characterizes and identifies itself with its living space.

### ***Intangible Cultural Heritage***

Includes a body of creations, knowledge, know-how, practices, arts and extant popular traditions that pertain to any aspect of our social lives, as well as to the toots, objects or artifacts associated with them. Intangible heritage is borne in the collective memory and is handed down primarily from generation to generation through the processes of learning, observation and imitation. This form of heritage serves as a source of cultural endeavours, marks the city's identity, is preserved and is shared by a range of communities and socio-economic groups and is often referred to as "living heritage."

### **Incentives:**

#### ***Renovation a la carte***

The program encourages owners to restore components with heritage value instead of replacing them as one aspect of the program. Any individual or legal entity with a right of ownership over a building that meets the following requirements is eligible (provided all other program conditions are met):

- The building was constructed or converted into a residential or mixed-use building (a building that is both residential and commercial) at least 20 years ago.
- The average property value per unit (land and building) does not exceed the maximum amounts listed in the chart "Building Eligibility".

#### **Major Residential Renovation**

Owners are granted a percentage of the cost of work as established by the Ville de Montréal, up to the maximum eligible amount per unit, which varies according to the type of dwelling. The financial assistance can reach 75 % of the maximum eligible cost of work but the rate of financial assistance is adjusted so the owner meets at least 33 % of the total cost of the project. It is also possible to renovate buildings without rental units if it is a single-unit building (single-family home). The percentage of financial assistance is then 50 %.

For renovation projects, the maximum amount of financial assistance is \$500,000 per building. For demolition-reconstruction projects, the maximum amount granted may be higher.

**Eligibility:**

- The building was constructed or converted into a residential building at least 20 years ago.
- The building is rundown, i.e. it includes at least one important component requiring substantial renovation.
- The cost of the work required on the building exceeds the amounts fixed by the program.
- The average property value per unit—land and building—does not exceed the amounts fixed by the program (see chart "Building Eligibility")

**Assistance towards home ownership**

*Financial assistance towards home ownership to invest and live in Montréal*

With the Home Ownership Program, owners take advantage of:

- A refund of the real estate transfer tax if you are a family and you purchase an existing residential building with 2 or 3 above-ground dwelling units.

**Purchase price**

- Household without children (more than one buyer): \$250,000
- Household with at least one child: \$280,000
- Household with at least one child (family housing unit – 3 bedrooms): \$360,000

In addition, owners are entitled to receive 6 months of free public transit on purchase of a one-year OPUS full-fare pass, and to 2 Accès Montréal cards to take advantage of rebates on many activities offered in the cultural metropolis. The amount of financial assistance is \$4,500, \$10,000 or \$12,500 according to the type of household and, in some cases, the habitable floor area.

**Tools:**

**Urban Heritage Interactive Publications**

These interactive publications provide tools, tips, and strategies to help owners take care of Montreal's Urban Heritage.



*Heritage and Quality Heritage Guide, 2014*



*Heritage and Quality Heritage Guide, 2013*

**Heritage Awareness:** Montréal's Architectural Heritage Campaign, created in 1991, is an initiative of the city with the collaboration of the Héritage Montréal foundation. This annual event was designed to educate Montrealers about the importance of protecting our heritage and to recognize property owners' efforts to maintain their property.

## BEST PRACTICE CASE STUDY: SAN FRANCISCO



**Population:** 837,442

**Approximate number of sites on the Register:** 230 landmark sites; over 3,300 parcels are listed in *or determined eligible* for listing on the California Register

**Historic Districts:** 11

**Heritage Department Employees:** 14

**Heritage Program:** Established in 1967

**Overall Program Description:** In San Francisco, historic preservation is a strategy for conserving significant elements of the built environment in order to maintain a tangible physical connection to the past.

Preservation of significant historic and cultural properties is an important aspect of planning in San Francisco. Much of San Francisco's character, enjoyed by residents and visitors alike, depends on the retention of its rich historical building fabric. In practical terms, maintaining and rehabilitating older buildings and neighborhoods can mean savings in energy, time, money, and materials; preservation is an inherently "green" strategy.

The Planning Department's Historic Preservation program therefore plays an important economic, environmental, and cultural role in the ongoing development of San Francisco.

Historic Preservation program staff are responsible for a variety of tasks, including project review, environmental review, Historic Preservation Commission support, and historic and cultural resource surveys.

### **Recent Activity**

**NEW: Window Replacement Standards** The Planning Department recently developed a comprehensive guide to help property owners choose the appropriate window treatments and to efficiently apply for a permit.

**SF Heritage** (a non-profit society):

Charged to preserve and enhance San Francisco's unique architectural and cultural identity, SF Heritage aims to help manage change over time, advocating for smart growth through the protection and reuse of historic structures and landscapes. Acknowledging the symbiosis between cultural and material sustainability, SF Heritage collaborates with local, state and national partners on education, neighborhood outreach and public testimony to help preserve the built environment that defines San Francisco.

SF Heritage is a nonprofit membership organization. Since its founding in 1971, SF Heritage has built on its activist underpinnings and has dedicated itself to citywide advocacy and education. This includes special programs, regularly-scheduled tours and rental of the Haas-Lilienthal House and grounds (property donated to Heritage in 1973).

In 1971, a group of like-minded individuals concerned with the demolition of historic buildings in San Francisco formed The Foundation for San Francisco's Architectural Heritage. The group was particularly concerned with the Western Addition, which had suffered from post-war "urban renewal" policies that had leveled whole neighborhoods. Soon after its incorporation, Heritage entered into negotiations with the City of San Francisco Redevelopment Agency in cooperation with the Landmark Board to identify the best examples of remaining buildings scheduled for demolition, and to find a way to preserve them. By December 1977, Heritage was able to declare the Western Addition project substantially completed with twelve homes relocated in what may have been the largest house moving project in San Francisco history.

### ***Preserving Historic Downtown***

In the mid-1970s San Francisco entered into what would become the greatest downtown building boom since the post-1906 reconstruction. This new wave of development threatened several important historic structures including the Alaska Commercial Building and the Fitzhugh Building. Rather than fight individual conservation battles, Heritage embarked on a course of action that would lead to a comprehensive preservation policy.

The first step was to survey downtown and to identify architecturally significant structures. This survey was completed in 1978, and Heritage announced its intention to publish a summary of the findings; this became the book "Splendid Survivors: Downtown San Francisco's Architectural Heritage."

### **Historic Property Inventory**

In the early 1980s, continued erosion of the historic downtown core demonstrated that the process of educating developers, city officials and the public about the significance of San Francisco's downtown architecture was not able to get ahead of the rapid rate of development. Developers also began to focus on resources in adjacent areas, posing a threat to even more historic structures.

With a two-year \$35,000 grant from the San Francisco Foundation, SF Heritage began an extended survey into these threatened areas. Financial assistance from the National Trust for Historic Preservation allowed Heritage to contract with John M. Sanger Associates, Inc. to study the downtown conservation measures of other major cities. This study developed into Splendid Extended, an inventory of several thousand properties. In August of 1983, with the extended survey in its final stages, the City of San Francisco made the downtown plan public. Planning department staff used Heritage's survey as a principle resource, supplemented by additional research and field study, to arrive at ratings for significant structures.

**Incentives:**

- **Mills Act**

The Mills Act is an important economic incentive program available in California for use by private property owners of qualified historic buildings. Enacted by the State of California in 1976 and amended in the San Francisco Administrative Code in 1996, the Mills Act provides for a potential 50 percent reduction in property taxes on qualified historical properties in exchange for the owner's agreement to maintain and preserve the resource in accordance with standards established by the Secretary of the Interior's *Standards for the Treatment of Historic Properties*.

- **Federal Tax Credits**

A 20% Rehabilitation Tax Credit is available for the rehabilitation of income-producing properties listed individually in the National Register or as contributors to a National Register Historic District. This significant tax savings is applied only to buildings rehabilitated according to the U.S. Secretary of the Interior's Standards for Rehabilitation.

- **Preservation Easements**

Property owners can gain significant tax savings by adding a preservation easement to their historic building. This easement ensures the preservation of a property's significant architectural features while allowing the owner to still occupy and use the building. Easements also limit the future owners of a building from demolishing the building or altering it in a way that negatively impacts its architectural features. In this way, Preservation Easements provide for the permanent protection of historic buildings.

- **California Historical Building Code (CHBC)**

The CHBC provides an alternative building code for the preservation or rehabilitation of buildings designated as "historic." These regulations are intended to facilitate repair or accommodate a change of occupancy so as to preserve a historic resource's original or restored architectural features. Issues addressed by the CHBC include: use and occupancy; means of egress; archaic materials and methods of construction; fire protection; alternative accessibility provisions; mechanical, plumbing, and electrical requirements; and alternative structural regulations.

- **Preservation Loan Program (PLP)/Preservation Loan and Technical Assistance Program (PLTAP)**

Joint contract with the City of San Francisco to assist low and moderate income property owners in the restoration and rehabilitation of architecturally significant houses. Funding through the Mayor's Office of Housing and Economic Development helped set up the Preservation Loan Program (PLP) by the end of 1977. In just four years, PLP made possible the rehabilitation of nineteen significant houses in districts all over the city. Minorities and/or women heads-of-household made up 90 percent of the loan recipients.

By 1982, with the original loan pool nearly depleted, PLP shifted its focus and took a new name to reflect its new emphasis. The renamed Preservation Loan and Technical Assistance Program (PLTAP) worked increasingly with nonprofit housing development corporations on multi-unit residential rehab projects for low-to-moderate income people.

**Tools: Heritage FAQ Page:  
Examples from the San Francisco FAQ Page**

- ***Do I need a permit to replace the windows of my building?***  
Yes. A building permit to replace windows is required for every building in San Francisco, even non-historic buildings. Building permits are required for windows located on the front, rear, and sides of the building. Additional review by the Planning Department is required for all replacement windows that are visible from the street or other public right-of-way. The 2003 revised *Residential Design Guidelines* require that some property owners use historically appropriate window replacements, such as wood-sash, rather than vinyl or aluminum. The Planning Department has recently developed a comprehensive guide to help building owners choose the appropriate window treatments and to efficiently apply for a permit. For detailed information, please consult the *Window Replacement Standards*. *A reminder:* Please do not purchase replacement windows before confirming with the Planning Department that the windows can be approved. The Planning Department will not approve inappropriate replacement windows, even if they have already been purchased or installed. The Planning Department also strongly suggests repairing, rather than replacing windows.
- ***Can I add a garage to my building?***  
Inserting a new garage opening can have a major impact on a historic resource and its surrounding neighborhood. Due to this potential impact, the Planning Department reviews proposals for new garages on a case-by-case basis. In some instances garages are not approved for historic resources, particularly if the addition would negatively impact the building's character-defining features such as front yard set-back, bay windows, front porches, or historic fences. More information on the procedures and criteria for adding garages are found in *Guidelines for Adding Garages and Curb Cuts*.
- ***Can I add an addition to my house?***  
A vertical or horizontal addition to any building, regardless of historic status, must conform to the *Residential Design Guidelines*. Additions to known historic resources must also meet the Secretary of the Interior's Standards and Guidelines for the Treatment of Historic Properties and any applicable requirements outlined in Article 10 of the Planning Code. Generally, if an addition does not alter, change, obscure, damage, or destroy any character-defining features of a historic resource or building located within a historic district then it will be deemed in conformance. The Planning Department strongly urges project applicants to engage with a Historic Preservation Technical Specialist early in the design process, in order to identify potential limitations.
- ***Can I raise my house to add an extra story?***  
Enlarging buildings by raising them and adding a new first floor was common at one time. Many cottages throughout San Francisco were originally one to 1.5 stories in height. These modest cottages were set on wood pilings instead of solid foundations. Buildings that must be raised for seismic retrofitting or to install a foundation will be approved. However, despite historic precedents, raising buildings designated as historic resources may not be considered appropriate and all proposals will be reviewed on a case-by-case basis.

**Heritage Awareness:**

- San Francisco Architectural Heritage
- The Friends of 1800
- Victorian Alliance
- San Francisco Historical Society
- San Francisco Public Library History Center
- San Francisco Planning & Urban Research (SPUR)
- Docomomo US, Northern California chapter

## BEST PRACTICE CASE STUDY: CHICAGO



**Population:** 2,718,782

**Chicago Historic Resources Survey:** 17,000+ properties in the database

**Designated Sites:** 370; 53 landmark districts and 7 district extensions.

**Overall Program Description:** The Department of Planning and Development's Historic Preservation Division works with property owners, city departments, sister agencies, and the general public to promote the preservation of Chicago's historic resources. The division researches and prepares landmark designation reports and reviews permit applications for work on proposed and designated landmarks. It also administers the Demolition-Delay Ordinance, maintains the Chicago Historic Resources Survey, and promotes the preservation of historic buildings through incentives, preservation planning, public outreach, and technical assistance. The division staffs the Commission on Chicago Landmarks, which is responsible for recommending potential landmark designations to the City Council.

### **Policy/Strategies/Guidelines/Planning and By-Law Tools**

- **Demolition Delay Ordinance** (90 days to explore alternative options):  
The Demolition-Delay Ordinance, adopted by City Council in 2003, establishes a hold of up to 90 days in the issuance of any demolition permit for certain historic buildings so that the Department of Planning and Development can explore options, as appropriate, to preserve the building, including but not limited to landmark designation.

The ordinance applies to buildings rated "red" and "orange" in the Chicago Historic Resources Survey (CHRS). These buildings are designated on the city's zoning map. The delay period starts at the time the permit application is presented to the department's Historic Preservation Division offices and can be extended beyond the original 90 days by mutual agreement with the applicant. The purpose of the ordinance is to ensure that no important historic resource can be demolished without consideration as to whether it should and can be preserved.



**STRATEGY 1:** A separate Demolition-Delay Ordinance, adopted by City Council in 2006, establishes a delay of up to 90 days in the issuance of demolition permits for roof-top water tanks in order that the Department of Planning and Development can explore options, as appropriate, to preserve the tank. Fewer than 200 remained in the city at the time of the ordinance adoption, which applies to any wooden or metal tank that is elevated and visible from the public way. The delay period starts when the permit is presented to the department's Historic Preservation Division offices and can be extended beyond the original 90 days by mutual agreement with the applicant. Tanks that pose imminent health or safety hazards are not covered by the ordinance.

- **Landmarks Ordinance** (and the Rules and Regulations of the Commission on Chicago Landmarks) -updated May 1, 2014  
The Commission on Chicago Historical and Architectural Landmarks was created in 1957 by the City Council. It served primarily as an advisory board, whose principal purpose was to compile a list of significant buildings. In 1968, the City Council adopted a **landmarks ordinance that gave the Commission the responsibility of recommending to the Council which specific landmarks should be protected by law**. The ordinance also gave the Commission the authority to review building permits for landmarks, to ensure that any proposed alterations would not negatively affect the character of the landmark.

In 1987, the ordinance was revised to more clearly articulate the processes for landmark designation and permit review and to add an economic hardship provision for owners. The Commission also was renamed the Commission on Chicago Landmarks at that time.

In 1997 and 1999, other revisions were made to the ordinance, including regarding the status of "pending" landmarks, the waiving of permit fees for owners of landmark properties, and requiring review by the City Council of any demolitions approved by the Commission. In 2009, the Commission membership was expanded from 9 to 10 members (to add an additional ex-officio member as part of a city department reorganization).

- **Chicago Zoning Ordinance**  
Floor area bonuses for "adopting" an historic landmark

#### **Municipal Preservation Incentives/Financing**

- **Permit Fee Waive for Chicago Landmark Properties**  
Provides a tax incentive for permit issued on historic landmarks. This incentive is available for all individually landmarked buildings as well as all buildings and new construction in landmark districts. Only fees for permits for which Commission approval is required can be waived.
- **Class-L Property Tax Incentive**  
Reduces the property tax rate for 12 years for rehabilitating a landmark building in a commercial or industrial use. Must provide a minimum investment of 50% of the building's assessed value to be eligible for the incentive. The Class L property tax incentive was established to encourage the preservation and rehabilitation of landmark commercial, industrial, and income-producing non-profit buildings.

Under the Class L incentive, the assessment levels for the improvement or building portion of the assessment are reduced to 10 percent for the first 10 years, 15 percent in year 11, 20 percent in year 12, and back to the regular assessment level in year 13. The other portion of the assessment, the land portion, is also eligible for the incentive if the building has been vacant or unused continuously for the prior two years.

- **Facade Rebate Program**

For certain qualifying industrial and commercial buildings, a 30% or 50% rebate (depending on the use and type of project) of approved costs for facade renovations of up to \$5,000 per storefront or \$10,000 per industrial unit.

- **Property Tax Freeze for Historic Residences** (owner-occupied only) -

In 1983, the State of Illinois passed a statute enabling homeowners who rehabilitate their landmark property to receive a freeze on their property tax assessment for eleven years.

*Eligible buildings include:*

- A building individually listed on the National Register of Historic Places
- A Contributing building in a National Register Historic District
- A building locally designated as a Landmark
- Contributing buildings in a locally designated Historic District

The incentive freezes property taxes over an eleven-year period for rehabilitation of an owner-occupied single-family home, condo, coop unit, or multi-family building of up to 6 units, where one unit is owner-occupied.

## BEST PRACTICE CASE STUDY: MELBOURNE



**Population:** 116,431 within City administrative boundary; 4.35 million in metro area

**Heritage Conservation Program Establishment:** 1982

**Approximate number of sites on Register:** 8,000 properties listed on i-Heritage Database; >1,500 registered properties on Heritage Inventory

### **Overall Project Description:**

The City of Melbourne's heritage planning policies and initiatives date back to the early 1980s, when it commissioned the first heritage studies in the city. The Register of Historic Places, established in 1974, was already in place and the City moved quickly through the 1980s to activate a robust heritage planning and conservation program. In 1988, the Melbourne Heritage Restoration Fund was launched as a non-profit partnership between the City and State of Victoria. As an integral part of the city's planning scheme, Melbourne's heritage conservation program seeks to manage and protect identified historic places by implementing a variety of planning controls, offering financial incentives and promoting awareness through the city's i-Heritage Database. The City has recently adopted a 15-year Heritage Strategy and has also developed an Indigenous Heritage Study and Strategy (Part 1) to ensure that Indigenous sites, stories and events are together identified, managed and celebrated.

### **Program Components:**

- **Melbourne Heritage Restoration Fund:**
  - Financial incentives to help conserve and restore the heritage of the City of Melbourne for the enjoyment of the wider community
  - Managed through Victoria's Heritage Restoration Fund
- **i-Heritage Database** on city's website, which contains the following information (when available) on more than 8,000 properties, as well as **streets** and **laneways**:
  - building grading
  - architectural style
  - heritage status
  - notable features
  - statements of significance
  - historical information
  - builder
  - photograph of current building

- **Heritage Overlay** – planning controls that require permits for work undertaken on historic buildings on specific properties and in specific areas,
- **Heritage Precincts:**
  - Statements of Significance developed for each precinct, along with key attributes
  - All buildings within precinct are governed by requirements of Heritage Overlay
  - 11 Precincts developed within Capital City Zone
- **Heritage Strategy:**
  - Endorsed in 2013
  - Outlines the direction of the program over the next 15 years
  - The City has also generated a separate **Indigenous Heritage Study and Strategy** (Part 1)

## BEST PRACTICE CASE STUDY: PERTH



**Population:** 21,860 within City administrative boundary; 1.97 million in metro area

**Approximate number of sites on Register:** 260 (some sites include more than one building)

### Overall Project Description:

The award-winning heritage conservation program operated by the City of Perth is notable for its strong incentive framework for property owners, where *all* listed (on City register) properties are eligible for grants. The grants can also be used to initiate *Conservation Plans*, which help to ensure that properties are preserved/rehabilitated/restored to a high calibre. There is also a Heritage Rate Concession program that helps property owners maintain their heritage buildings, as well as loan subsidies. Transfer and Bonus density programs provide further incentives for the conservation of historic buildings. Three Heritage Conservation Areas have been established in the centre of the city.

### Program Components:

- **Heritage Grants:**
  - All rateable, heritage listed properties (on register of heritage places attached to City Planning Scheme) are eligible.
  - Grants are awarded to help assist in the conservation, understanding or use of a heritage building.
  - **Conservation Plans** are strongly encouraged before any work is undertaken, these are also **eligible for grants**; Conservation Plans are a requirement to be eligible for grants from the State (Western Australia) Heritage Council.
- **Heritage Rate Concession** – the aim of the rate concession program is to support heritage property owners in the maintenance of their buildings. The City appreciates that the discount will not cover all the costs of maintenance, but the intention is to develop this scheme to provide more practical assistance. Meanwhile, it offers owners an **incentive to conduct regular maintenance**, which will also help to secure their investment in the property and limit the chances of major expenses for future repairs
- **Heritage Loan Subsidies (State Government of Western Australia):**
  - The City of Perth is a participating Local Government Authority in the Heritage Loan Subsidy Scheme
  - The scheme offers loans at a reduced rate to successful applicants in order to **help owners of heritage properties undertake conservation works**
  - A property must be listed on the City's register in order to be eligible

- **Heritage Agreements** – define the commitments and the responsibilities of the owner and the incentives that they will receive in return; required for major incentives, such as transfer of density
- **Transfer of Density** - the City of Perth offers an incentive to conserve cultural heritage places and conservation areas by transferring a portion of unused plot ratio from a place (donor site) to a receiving site (recipient site) where the transfer will not adversely impact on the cultural heritage and general amenity of the city
- **Bonus Density** - allows Council to award additional plot ratio (density) to what is prescribed in the Planning Scheme for a development, in return for the protection of the cultural heritage significance of a heritage listed place
- **Heritage Conservation Areas:**
  - Three conservation areas in the centre city
  - King Street and William Street Conservation Areas classify properties as either 'Considerable Cultural Heritage Significance'; 'Some/Moderate Cultural Heritage Significance'; or 'Non-heritage properties'
  - The Barrack Street Conservation Area classifies properties as either 'Heritage' or 'Non-heritage'

## BEST PRACTICE CASE STUDY: SYDNEY



**Population:** 187,561 within City administrative boundary; 4.76 million in metro area  
**Approximate number of sites on Register:** 2,360

### Overall Project Description:

The City of Sydney's heritage conservation program is supported by the comprehensive Heritage Development Control Plan. Some of the major program components include: a transfer of density program (Heritage Floor Space Scheme); Heritage works without [development] consent policies; and Heritage Conservation Areas, which are spread throughout the city. The transfer of density program is designed to make heritage conservation programs financially feasible by transforming unused development potential into a transferable commodity. Providing heritage property owners with the opportunity to carry out certain works without development consent helps encourage the continued maintenance of historic buildings. Buildings within the Heritage Conservation Areas are evaluated and grouped into three categories, including Contributory, Neutral and Detracting. Buildings deemed to be Contributory can be the focus of conservation efforts within the neighbourhood.

### Program Components:

- **Heritage Development Control Plan** – provides objectives and provisions for the [conservation] of buildings with heritage significance, either individually or as part of their street or area. The aims, in relation to heritage are to:
  - Establish the framework for detailed heritage and conservation planning; and
  - Ensure that development applications for heritage items and works within heritage conservation areas and heritage streetscapes are assessed on the basis of heritage significance and desired heritage outcomes.
- **Heritage Floor Space Scheme** - provides an incentive for the conservation and ongoing maintenance of heritage items in central Sydney by allowing owners of heritage buildings to sell unused development potential from their site, known as heritage floor space (HFS):
  - When a heritage item owner completes conservation works they may be awarded HFS by the City of Sydney
  - The awarded HFS can then be sold to a site that requires it as part of an approved development application
  - The money raised offsets the cost of conserving the heritage item
  - Depending on quantum and market conditions, the current purchase price is approximately \$400 per square metre
  - Conservation Management Plan required
  - Covenant registered on title of heritage property

- **Heritage works without consent** - to make it easier for owners to maintain and repair their properties, the Sydney Local Environmental Plan specifies certain development that may be carried out to heritage items or within heritage conservation areas without the need for development consent. These works may include re-painting a building in an original or appropriate colour scheme, replacing rusty gutters and down pipes to match original details or restoring a front verandah to its original detail.
- **Heritage Conservation Areas** – established throughout City; buildings within each Area are determined to be either:
  - *Contributory*: make an important and significant contribution to the character of a heritage conservation area of heritage streetscape and have a reasonable to high degree of integrity and date from a key development period of significance. Contributory buildings are defined as buildings that are from a significant historical period layer, highly or substantially intact or significant historical period layer, altered yet recognisable and reversible.
  - *Neutral*: do not contribute or detract from the significant character of the heritage conservation area or heritage streetscape. Buildings that do not belong to a key period of significance, good contemporary infill, and development from a key period of significance, which has been irreversibly altered, are identified as neutral.
  - *Detracting*: intrusive to a heritage conservation area or heritage streetscape because of inappropriate scale, bulk, setbacks, setting or materials. They do not represent a key period of significance and detract from the character of a heritage conservation area or heritage streetscape.



# An Introduction for Homeowners

The 2014 Vancouver Building By-Law

One and Two Family Homes

Heritage

Character

VANCOUVER  
**HERITAGE**  
FOUNDATION



Appendix B

## WHY THIS GUIDE

The 2014 Vancouver Building By-Law was launched in 2014 and came into effect on January 1st, 2015. Vancouver Heritage Foundation has prepared this guide in collaboration with City of Vancouver staff to assist homeowners in understanding and following the By-Law requirements. Even if you are familiar with the 2007 By-Law, there are substantial changes that you will need to be aware of.

Retaining heritage and other older homes is important to the sustainability, economy and culture of the city. Vancouver Heritage Foundation is dedicated to supporting heritage conservation and encouraging the rehabilitation and reuse of buildings. VHF hopes that this guide will make the By-Law requirements clearer, avoiding unnecessary waste and cost. While By-Law requirements need to be met, it is usually possible to do this while still retaining the historic features and fabric of the home.



This document has been prepared to provide an introduction to the 2014 Vancouver Building By-Law requirements and is intended for guidance only. It has been prepared with the input and assistance of City of Vancouver staff. However, the By-Law, official bulletins and the decisions of City of Vancouver staff can take precedence over any statements in this document. It is recommended that options are explored in discussion with City of Vancouver staff, and that qualified professionals are consulted and engaged on construction projects. Appropriate approvals should always be obtained.

## GLOSSARY OF TERMS

**By-Law** The 2014 Vancouver Building By-Law, often referred to as the building code.

**Character House** A house that is considered to have heritage character merit by City of Vancouver staff, but is not listed on the Vancouver Heritage Register.

**Heritage House** A house that is listed on the Vancouver Heritage Register.

## REFERENCE DOCUMENTS

*2014 Vancouver Building By-Law*, City of Vancouver.

*Conservation of Heritage Buildings and Compliance with Vancouver's Building By-Law (VBBL)*. Bulletin 2014-07-BU, City of Vancouver.

Front cover photo credit: *Houses on Union Street*. Martin Knowles Photo/Media

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photo credit: Martin Knowles Photo/Media

# SECTION ONE

## INTRODUCTION AND OVERVIEW

If you are making changes to your home you may need to consider the requirements of the Vancouver Building By-Law. The By-Law, often referred to as the building code, sets out the minimum standards required for any new construction in the city of Vancouver. It also applies to existing buildings when work is being done, including rehabilitation of a building, building an addition, changing the use of a building or adding a secondary suite. The By-Law requirements aim to ensure that buildings are safe, efficient and usable for residents for the long-term, addressing health and safety, access, fire and structural aspects, as well as energy and water efficiency.

### WHO THIS GUIDE IS FOR

This introduction to the 2014 Vancouver Building By-Law is intended particularly for owners of heritage or character homes who are planning alterations.

This guide will be useful in planning a wide variety of projects, large or small, that involve retaining an existing one or two family home:

- Restoration work
- Additions, reconfiguring the layout or adding a secondary suite
- The renovation or rehabilitation of a home that will remain in residential use

If the intention is to strata-title the home, there are different requirements. Other building types and uses are also subject to different regulations and are not addressed in this guide.



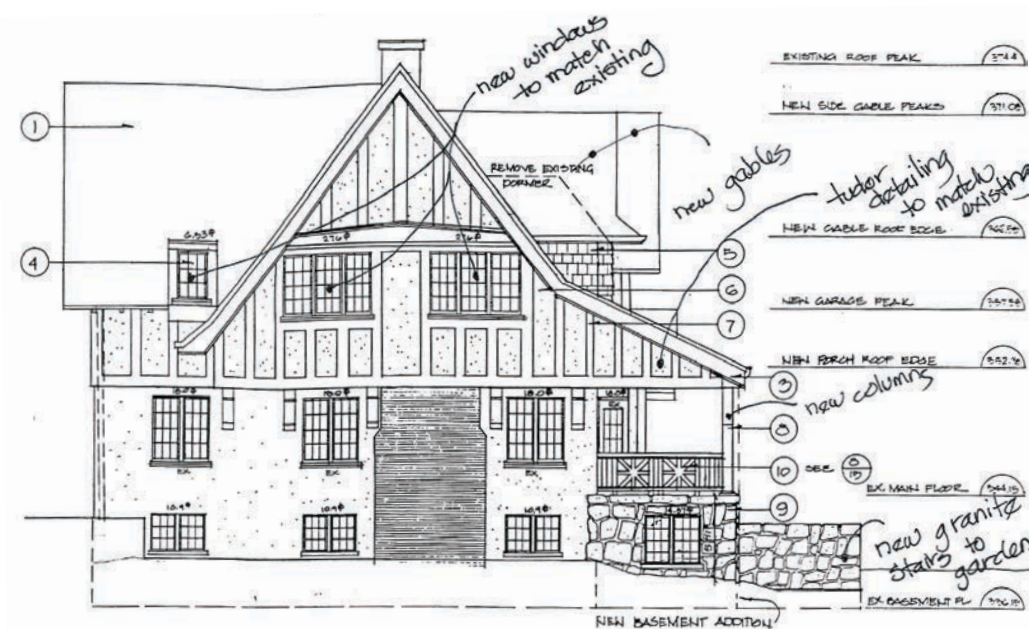
This guide is relevant for one and two family character and heritage homes including Mid-Century Modern, such as this 1947 home, which is listed on the Vancouver Heritage Register, as well as other older homes.

*Photo credit: Andre Rowland*

## OVERVIEW: PROJECTS INVOLVING EXISTING HOMES

Previous versions of the By-Law included some specific provisions for heritage buildings which continue in the 2014 By-Law. A December 2014 bulletin expanded this to character homes and has added some further flexibility, particularly regarding energy efficiency and custom windows. Additionally, when dealing with heritage elements of a home, there is an established process for a registered professional on the project, either an accredited architect or engineer, to propose alternate solutions for discussion with City staff.

In general, new work, such as an addition, will need to meet new construction requirements. However, the existing part of the building does not have the same requirements. Historic homes were built under different guidelines and do not need to be altered to conform fully to current new construction regulations.



Historic homes can be successfully restored and updated. Planning that considers how heritage elements will be retained and restored is essential.

When planning a project for an older home, VHF recommends working with qualified professionals and tradespeople who have knowledge and experience of historic construction, and who are sensitive to how it can best be retained. This can make a significant difference to the end result in terms of cost, performance and historic character, as well as the smooth running of the project.

VHF maintains lists of professionals and trades and can help connect you with the right people. For more on finding qualified and experienced people visit **Section 5**.

# SECTION TWO

## HOW THE BY-LAW AFFECTS YOUR HOME

### EXISTING HOMES

If making alterations, there are three main aspects that you will need to consider in order to comply with the By-Law:

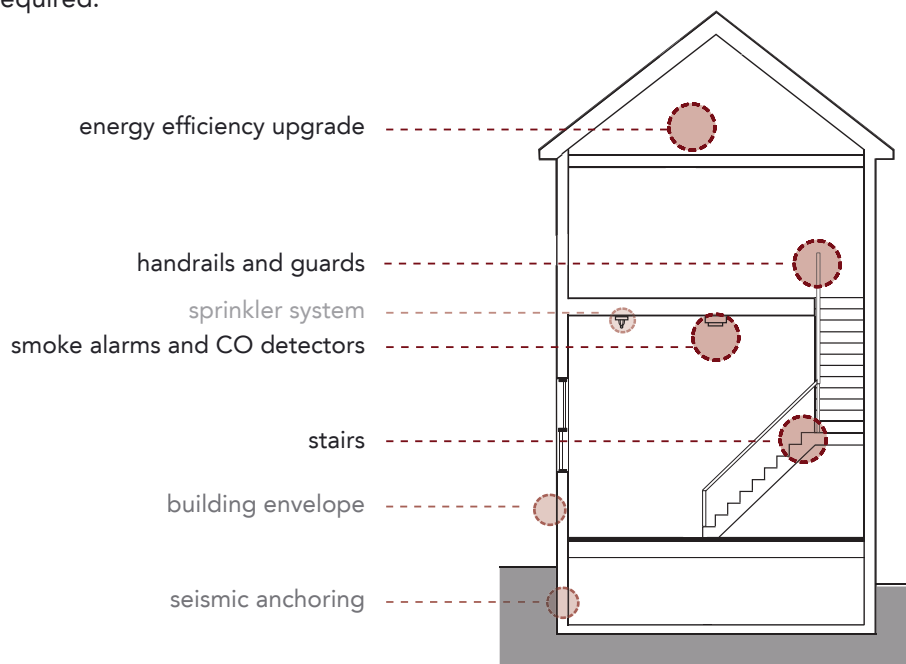
- Address any safety issues with stairs, handrails and guards\*
- Install smoke alarms and carbon monoxide detectors
- Make some energy efficiency upgrades

For larger projects, there may be additional requirements. If the project includes significant structural alteration such as building an addition or adding a floor to a home, you will need to consider seismic upgrades. Where a large proportion of the cladding on a building face is being repaired or replaced, building envelope upgrading may be needed for that wall. For major projects, or if units are added, you may need to install a sprinkler system. More information on each of these areas is offered on the following pages.

If you are choosing to do only certain upgrades voluntarily, such as installing sprinklers, improving exits or accessibility, seismic upgrades, energy efficiency, building envelope repairs, other upgrading, other than the correction of any safety issues, is not required.



**Above:** Addressing hazardous stair elements such as missing treads and handrails is a typical requirement under the By-Law. See Section Three for more on stairs.



- typical requirement
- may be a requirement
- requirement in major project only

\* If any other elements of the home are unsafe, they will also need to be addressed. See page 8 for guidance on addressing unsafe conditions.

## HERITAGE HOUSES AND THE BY-LAW

If a home is on the Vancouver Heritage Register, it can take advantage of the options available for heritage buildings in the By-Law and related bulletin. These aim to avoid unnecessary removal of heritage fabric and features, both exterior and interior.

A Statement of Significance is a useful starting point for planning any work to a heritage house. This document is typically researched and written by a heritage professional or consultant. It identifies the heritage values of the home and the important elements that should be retained during any changes made to the building or site. It can help you safeguard the special features of your home.

Windows are often a distinctive and important feature of a heritage house. Where the original windows still exist, these can be retained. If replacements are required for deteriorated windows, these can be made to match the historic ones with traditional materials and be approved for performance by a registered professional on the project.

Efforts to improve energy efficiency should be made – heritage houses are not excluded from this. However, the By-Law does not require intrusive measures such as removing interior or exterior finishes to accomplish this.

[Click here to read the Bulletin about heritage and character buildings](#)



**A Heritage House:** As the home above is listed on the Vancouver Heritage Register, there are different options for how it may meet By-Law requirements while avoiding unnecessary loss of heritage fabric and character.



**A Character House:** Many homes in Vancouver are not on the Vancouver Heritage Register, but may still be recognized by the City as having heritage character. These homes may also take advantage of alternative methods for meeting By-Law requirements.

*photo credit: Martin Knowles Photo/Media*

## CHARACTER HOUSES

A house that is not on the Vancouver Heritage Register but that has many original character features may also be able to take advantage of the additional flexibility available to heritage houses. This is a new opportunity for the many character houses in the city and aims to encourage retention of these homes.

As with listed heritage homes, it is recommended that a plan which identifies the character elements of the home is created before planning work.

# SECTION THREE

## REQUIREMENTS WHEN DOING WORK

### ENERGY EFFICIENCY

If you are investing in your home to make alterations, it makes sense to improve energy efficiency for comfort, as well as financial and environmental benefits. This can usually be done non-intrusively, without opening up walls or replacing windows. Actions that can make a significant difference include:

- Improving insulation in attics and foundation walls.
- Reducing air leakage through open gaps around doors and windows.
- Installing storm windows to reduce heat loss and outside noise.



Existing windows do not need to be replaced.

### WHAT HAS TO BE DONE WHEN DOING WORK

If you are making alterations to a house, some upgrades are required by the By-Law.

#### Existing Stairs, Guards and Handrails

Unsafe conditions will need to be addressed. This would include broken treads or missing guards, etc. There is no other requirement to rebuild these elements to the standards for new construction unless they are being fully replaced or relocated as part of the planned work. There may be exceptions, for example if an attic space is being converted to living space or there is other added floor area served by the stair, an existing stairway may need to be upgraded to provide suitable access.

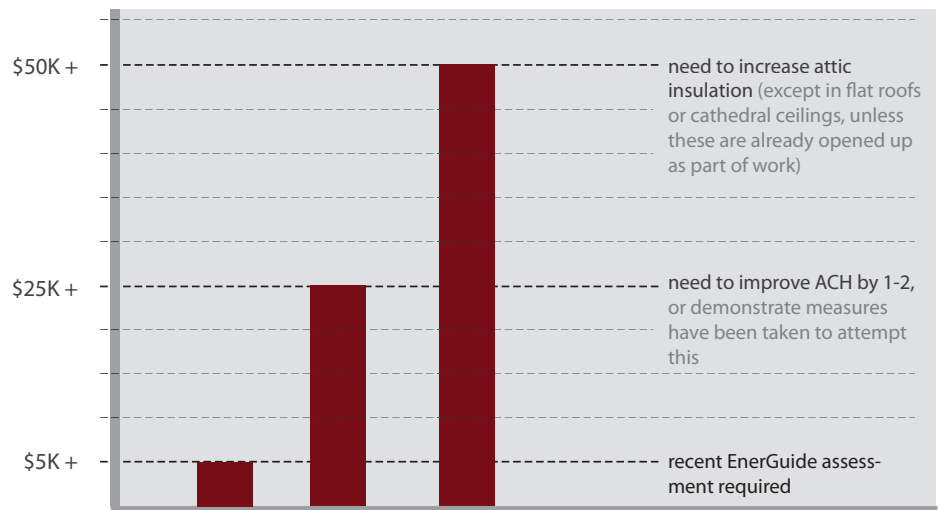
#### Alarms

Smoke alarms and carbon monoxide detectors must be installed. These are to be hard-wired and interconnected.

#### Energy Efficiency Improvements

Depending on the size of the project, various energy improvements are required.

- For a project with a value of \$5,000 or more, a recent EnerGuide home evaluation is required, completed within the last four years.
- For a project with a value of \$25,000 or more, air sealing measures are required to improve the Air Changes per Hour (ACH) by 1 or 2, unless the ACH is already less than 5.
- For a project with a value of \$50,000 or more, attic insulation will need to be improved. However, this does not apply to flat roofs or cathedral ceilings unless they are already being opened up as part of the work, whether from the interior or exterior.



Cumulative energy efficiency upgrades as required by project cost

See Section 5 for help with Energy Efficiency Upgrades



## WHAT MAY BE REQUIRED

In addition to items outlined on Page 8, there are some upgrades you may need to consider. These requirements in the By-Law depend on the size of the project or the type of work being done.

### Seismic Upgrading

Most older homes in Vancouver are wood frame construction sitting on a concrete foundation. If this junction of frame and foundation is being exposed as part of the work, the two need to be anchored together to secure the frame to the foundation.

For larger projects where the interior is being altered to create a more open floor plan, or when an addition is proposed, a structural assessment by an engineer will be required and structural upgrades may be needed.

### Further Energy Efficiency Improvements

If a new boiler or furnace is being installed and the project value is over \$5,000, the annual fuel utilization efficiency (AFUE) of the new unit must be at least 90%.

If the work involves opening up a flat roof or cathedral ceiling, either from the interior, or for reroofing, the insulation value may need to be increased.

### Exterior Walls

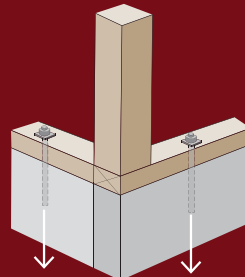
The exterior cladding system of a wall may need to be updated if most (usually more than 60% of the wall surface) of the existing cladding is being replaced. This may not be necessary for a heritage or character house where the original cladding can be an important historic element.

### Adding a Sprinkler System

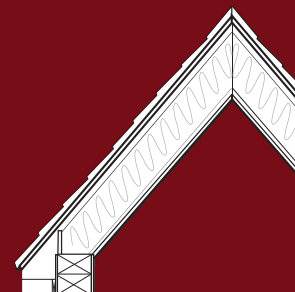
For major projects, the installation of a sprinkler system is likely to be required if the overall value of the project is more than 50% of the replacement value of the existing house. It may be required with other options available in the By-Law such as when proposing alternate compliance solutions.



**Building Face Repair:** Much of the siding on this historic house was in need of either repair or replacement prior to painting, but overall remained intact.



Many historic homes are built with a wood frame resting on a foundation. Seismic anchoring involves bolting the frame down to the foundation.



If opening up a cathedral ceiling (those with sloping sides that meet along a central ridge), insulation value may have to be increased.

# SECTION FOUR

## TYPES OF PROJECTS

### EXCEPTIONS

If voluntary work is done and limited to smoke alarms, sprinklers, exits, accessibility, seismic, energy efficiency or building envelope repair, this does not trigger other code requirements other than the correction of unsafe conditions.

These upgrades can generally be carried out without having to do others.

Different types of projects have some different requirements and considerations. The most common types are looked at below.

### REPAIRS AND RESTORATION WORK

On character and heritage homes, when there is a need to replace historic elements due to deterioration, these can be replicated in their original form, or a compatible form, and may not have to be made to new construction By-Law requirements. This can be important for achieving heritage restoration goals or maintaining the historic character of the home. This can apply to windows, doors and other exterior features such as siding.

It should be noted that restoration work must not create something that is unsafe or reduce the performance of the building. For example, a deteriorated or inefficient double-glazed unit could be replaced with a custom wood window with a double-glazed unit, but probably not with single glazing.



**Above:** The original windows of this character home had been replaced with aluminum frame windows. In restoring the home, the owner chose to install new, custom wood frame windows that fit with the home's heritage character.

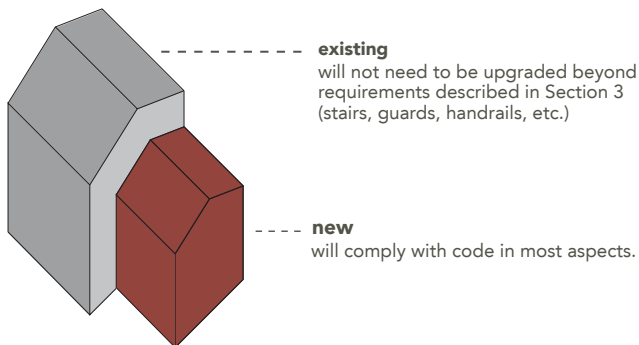
## BUILDING AN ADDITION

Building an addition onto an existing home can be a positive way to keep the house in use and update it for modern living. Overall, the house is still considered to be an 'existing building' for the By-Law purposes. The new construction will need to meet most aspects of the By-Law, however the original part of the building will not need to be upgraded beyond the requirements outlined in Section Three.

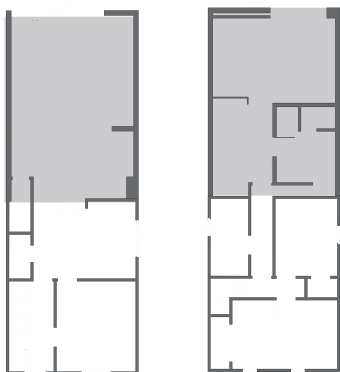
The requirements of new construction for providing adaptable housing, including adaptable bathrooms, lever door handles and wider doorways are not intended to apply to a project of this type if these are not already in place in the original house. The house does not need to be retrofitted to provide this.

Examples:

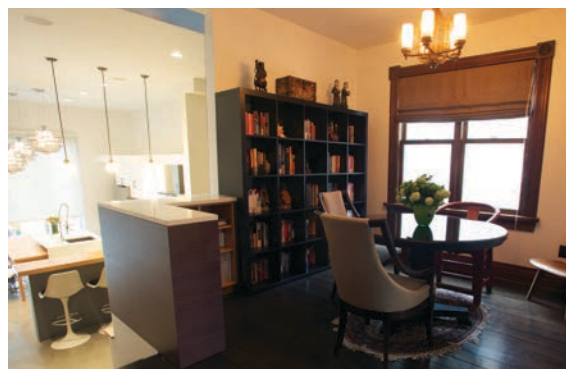
- In the original part of the house, existing traditional door knobs can be retained. In the addition, a consistent style can also be used. The addition is not limited to lever-style door handles.
- In the original part of the house, existing door widths can remain, and can be consistent, if desirable, in the new part also.
- Original windows can be retained. However, windows in the addition will usually need to comply as for new construction.



### Example: Building an Addition



- existing
- new construction



This Strathcona home was added onto at the rear, more than doubling its floor area. The existing house was able to retain many historic features without rebuilding them to current new construction requirements.



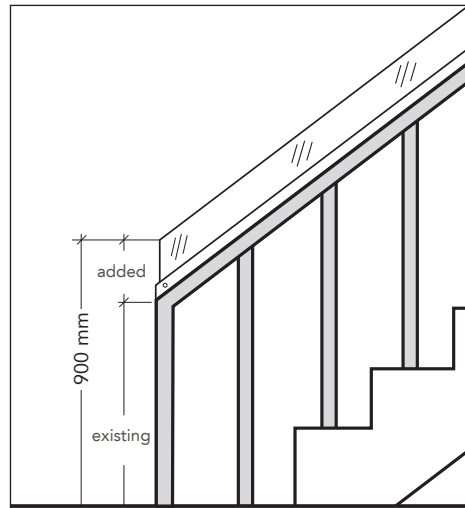
## CHANGE OF USE (INCLUDING CHANGING TO STRATA)

If the use of the house is going to be different than the current one family or two family home, other upgrades will likely be required. This includes changing it to multiple units with strata title. A higher level of upgrade will aim to make it more similar to a new building in many aspects.

If the intent is to strata-title the property, this should be established at the beginning of the project.

## ADDING A SECONDARY SUITE

When adding a secondary suite in an existing home, there are specific requirements for the suite itself which are laid out in the By-Law. However, there are some requirements that affect the rest of the house. Smoke alarms will need to be installed. The existing stairs can be retained but at least one handrail will need to meet the new construction standard. Existing guards throughout the house will need to be at least 900mm high – this can often be achieved by adding height sympathetically rather than replacing them.



## MOVING OR LIFTING A HOUSE

It may be necessary to lift a house to build new foundations, to increase the ceiling height for a suite, or to reposition it on its lot. A house might even be moved to a new lot to save it from demolition. In all these cases, the requirements set out on pages 8 and 9 would apply. Given the scope of work to move or lift a house these upgrades are cost effective.



The scope of projects on existing homes varies considerably, from updating a kitchen or restoring a porch to additions and whole-house renovations. This guide aims to provide a clear introduction to the aspects of the 2014 Vancouver Building By-Law that you will need to consider when planning a project. But you will need more information and expert advice so below are some resources that may be helpful.

The 2014 Vancouver Building By-Law is available for purchase from the Queen's Printer. Copies may also be available at branches of the Vancouver Public Library in the future.

- [2014 Vancouver Building By-Law](#)
- [Bulletin: Heritage Buildings and the VBBL](#)

The online version of this guide will be updated if further bulletins are issued.

## HELP WITH ENERGY EFFICIENCY

Energy efficiency requirements are new in the 2014 By-Law. The starting point is an EnerGuide home evaluation. This is performed by a certified energy advisor who assesses the energy performance of your home and provides a rating and a report.

For the energy efficiency upgrades required in the By-Law, you may be able to access rebates to help with the cost of improving insulation, reducing air leakage, and installing a new high-efficiency boiler or furnace. Information on current rebate programs available to City of Vancouver homeowners is available from BC Hydro and Fortis BC.

## VANCOUVER HERITAGE FOUNDATION RESOURCES

VHF supports homeowners and professionals in maintaining and restoring heritage buildings by providing information resources, educational programs and grants. Explore the VHF website and contact VHF staff if we can assist. Some resources you may find helpful include:

- **Trades and Professionals:** VHF can help connect you to professionals and tradespeople who have experience working with historic buildings and restoration techniques.
- **Case Studies:** VHF has researched ten different case studies on projects involving Vancouver buildings including homes. While not specific to the 2014 By-Law, these studies can provide ideas for how older buildings can be successfully updated.
- **Grants:** VHF offers four different grants to help with the costs for adding a home to the Heritage Register, planning conservation of historic elements, restoration work, and painting in historic colours.

[Vancouver Heritage Foundation](#)





VANCOUVER  
HERITAGE  
FOUNDATION

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Vancouver Heritage Foundation  
City of Vancouver Heritage Planning Group  
City of Vancouver Sustainability Group



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For more information about Vancouver Heritage Foundation please visit our website [www.vancouverheritagefoundation.org](http://www.vancouverheritagefoundation.org)

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